August 2026
OC HMIS User Meeting

211

Get Connected. Get Help.™

Orange County
UNITED WAY

Agenda

1. HMIS Participating Agencies Schedule
2. HMIS Data Entry & Performance Impact
3. Privacy and Personal Identifying Information Guidance
4. Exiting Clients from a Program
5. Data Element Highlight: Destination
6. HMIS Account Multi Factor Authentication
7. Funding Updates and Project Deactivation
8. HMIS Recertification Reminder
9. Project Performance Report - Goal 12
10. Project Performance Report
11. Training and Resources
12. Survey
13. Q&A
14. 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.

211
Get Connected. Get Help.™

Orange County
UNITED WAY

New Staff Update

Please welcome Kat Chu
as our HMIS Data Analyst!

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

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 @ 10:00AM	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

211 Get Connected. Get Help.™

Orange County UNITED WAY

HMIS Participating Agencies Schedule

August

- Project Performance Reports
  - Street Outreach Publication
  - Homelessness Prevention draft data
- Agency Audits
- HMIS User Recertifications
- System Performance Measure (SPM) and Longitudinal Systems Analysis (LSA) Data Quality Reviews

September

- Project Performance Reports
  - Homelessness Prevention Publication
  - PSH-OPH draft data
- Agency Audits
- System Performance Measure (SPM) and Longitudinal Systems Analysis (LSA) Data Quality Reviews

October

- Project Performance Reports
  - Permanent Supportive Housing & Other Permanent Housing Publication
  - Rapid Re-Housing draft data
- Agency Audits
- System Performance Measure (SPM) and Longitudinal Systems Analysis (LSA) Data Quality Reviews

211
Get Connected. Get Help.™

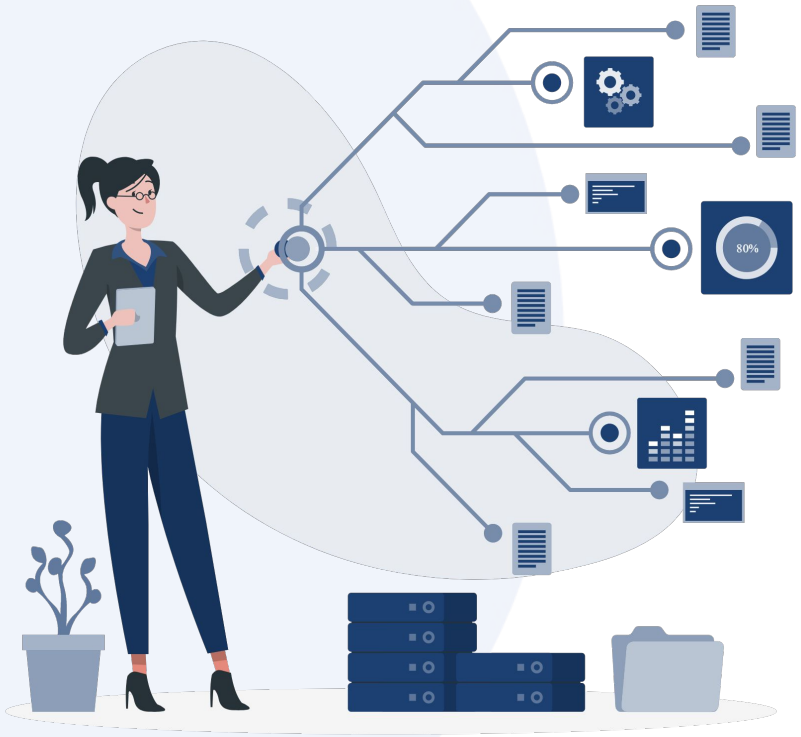
Orange County UNITED WAY

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.



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

211
Get Connected. Get Help.™

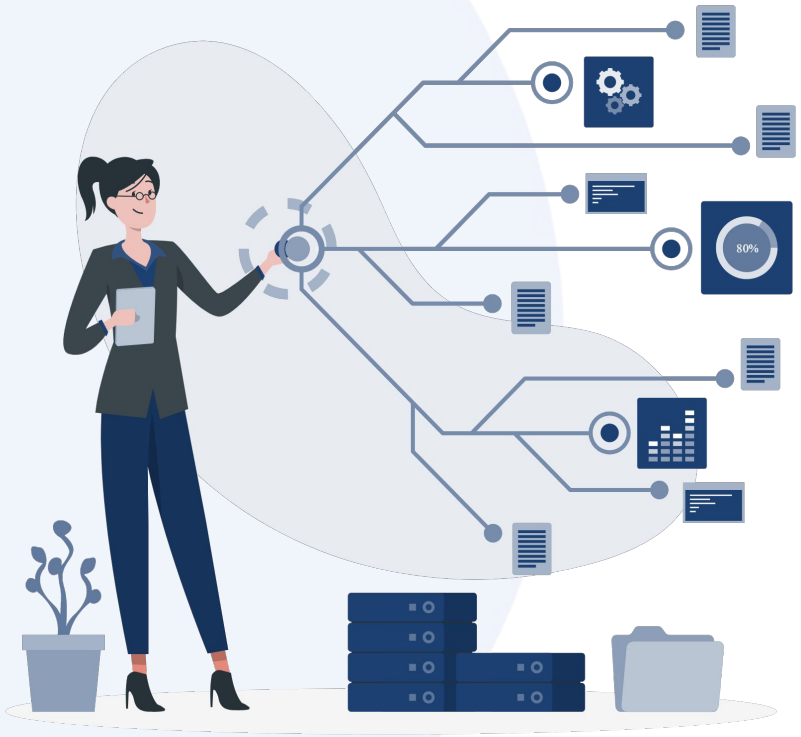
Orange County
UNITED WAY

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



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

211
Get Connected. Get Help.™

Orange County UNITED WAY

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

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

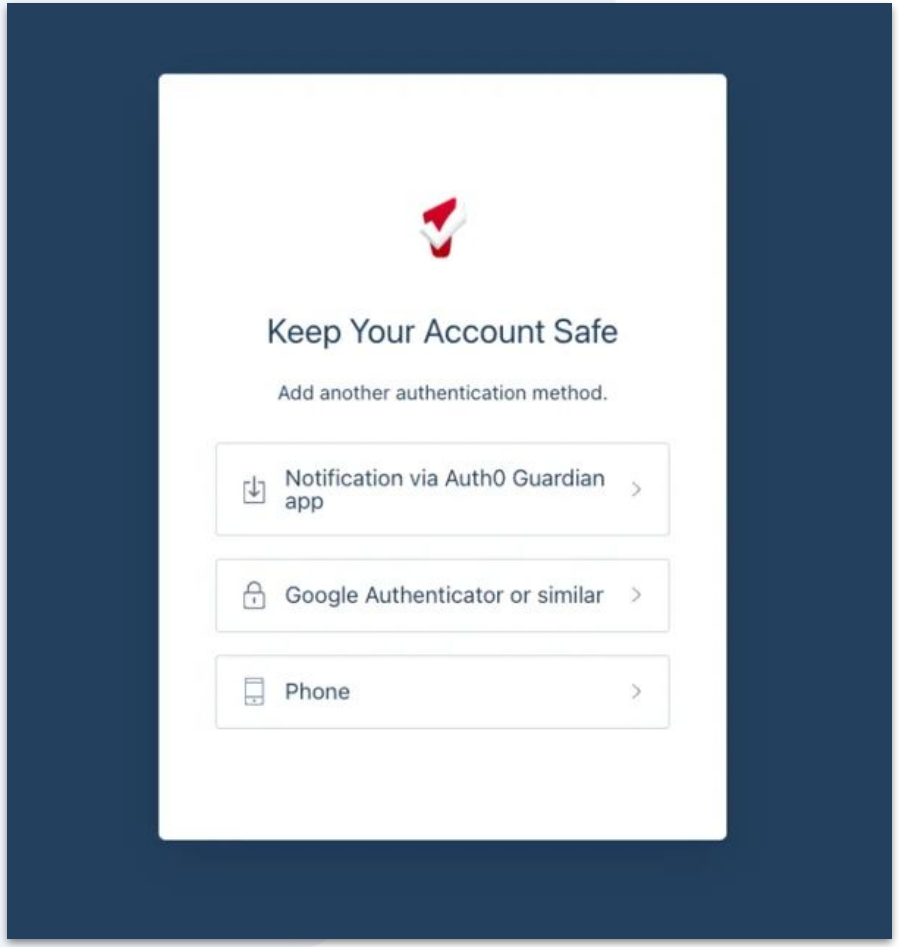
Multi-Factor Authentication (MFA)

We recognize and value the patience everyone has had with us during this transition. It is very much appreciated. Thank you!

To summarize the process for any email changes and new users, we're sharing the following:

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 desktop-based authenticators 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.



211
Get Connected. Get Help.™

Orange County UNITED WAY

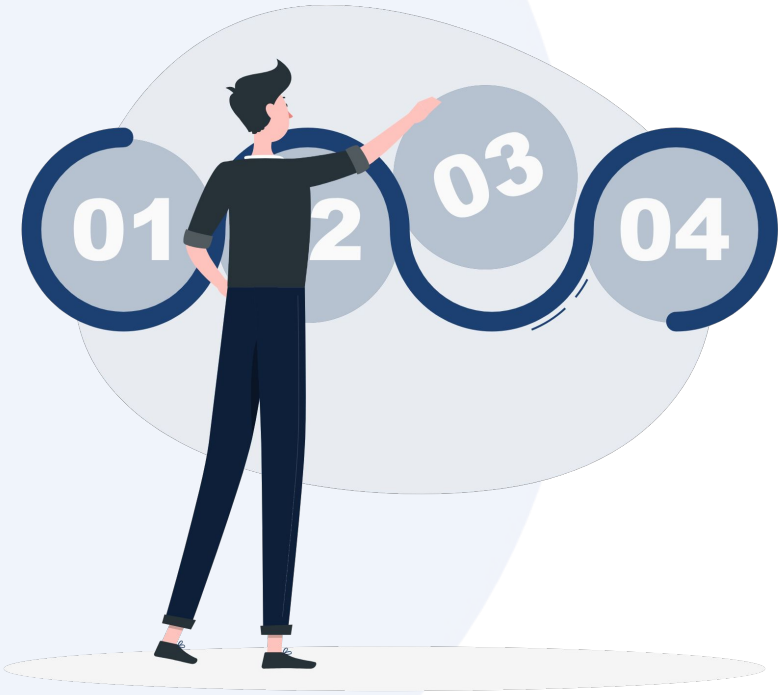
Exiting Clients - When to Exit & Date of Exit

Clients may be exited from a project for the following reasons:

- Successful program completion.
- Client/household has 90-days of no engagement.
- Client/household wishes to exit the program.

If a client is erroneously exited or must be reopened for data correction, the enrollment can be restored by navigating to the exit screen and clicking 'Reopen Client Program,' at the bottom right of the screen.

Learn more by reviewing the Reopen Program Enrollment Knowledge Base Article.



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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

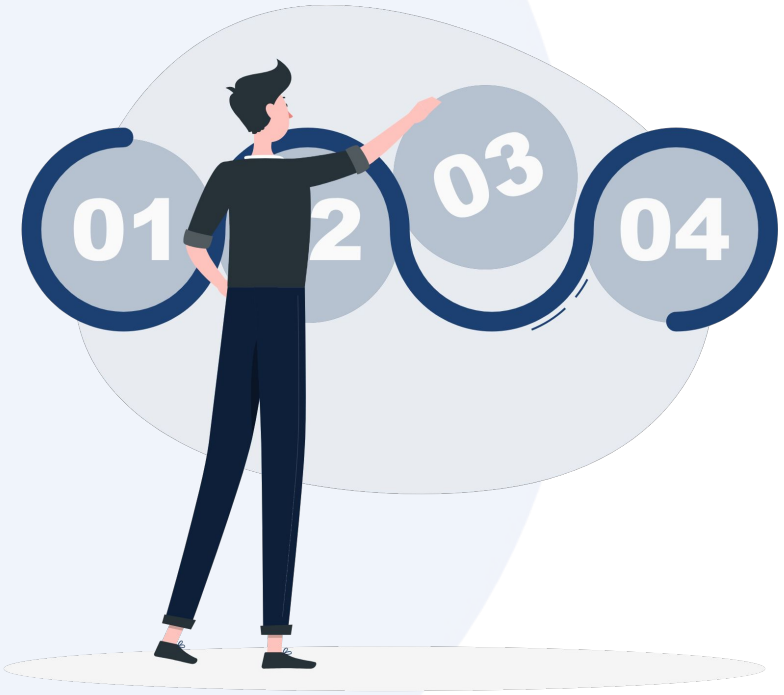
Exiting Clients - When to Exit & Date of Exit - Continued

When completing a program exit, be mindful...

For group enrollments, the option to exit several household members will appear. Toggle the switch next to the member(s) you wish to exit.

When exiting the Head of Household (HoH) from a group enrollment, a new HoH will need to be assigned before exiting the current HoH.

Review the Exiting Clients from a Project Knowledge Base Article for guidance on when and how to exit clients from a project.



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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Exiting Clients - When to Exit & Date of Exit - Continued

Program Exit Date:

- Remember to adjust the program exit date to reflect the last day the client received services or of bed/unit occupancy.

- Each household member of a group enrollment will have their own project exit date to reflect when they stopped receiving services/occupied the bed or unit.

Review the Project Exit Date Knowledge Base Article for additional details on the data element.

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

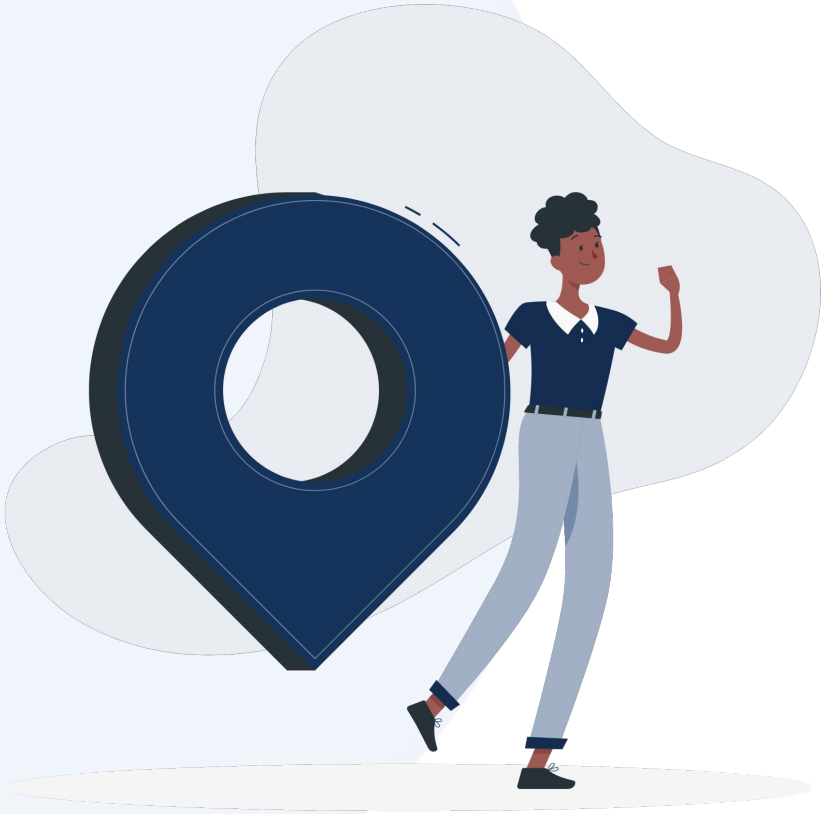
Data Element Highlight: Destination

3.12 Destination
Data Collected About: All Clients
Project Type: All HMIS Project Types
Collection Point: Project Exit

The Exit Destination field captures where the client is expected to stay after they complete or stop participating in project activities.

Select the 'Destination' that most closely matches where the client will be staying after exiting the project.

'Other' should be used only as a last resort if the client's destination truly cannot be even loosely described by any of the available options. Any response of 'Other' will not count in any HMIS-based reporting as a positive outcome.



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

211
Get Connected. Get Help.™

Orange County UNITED WAY

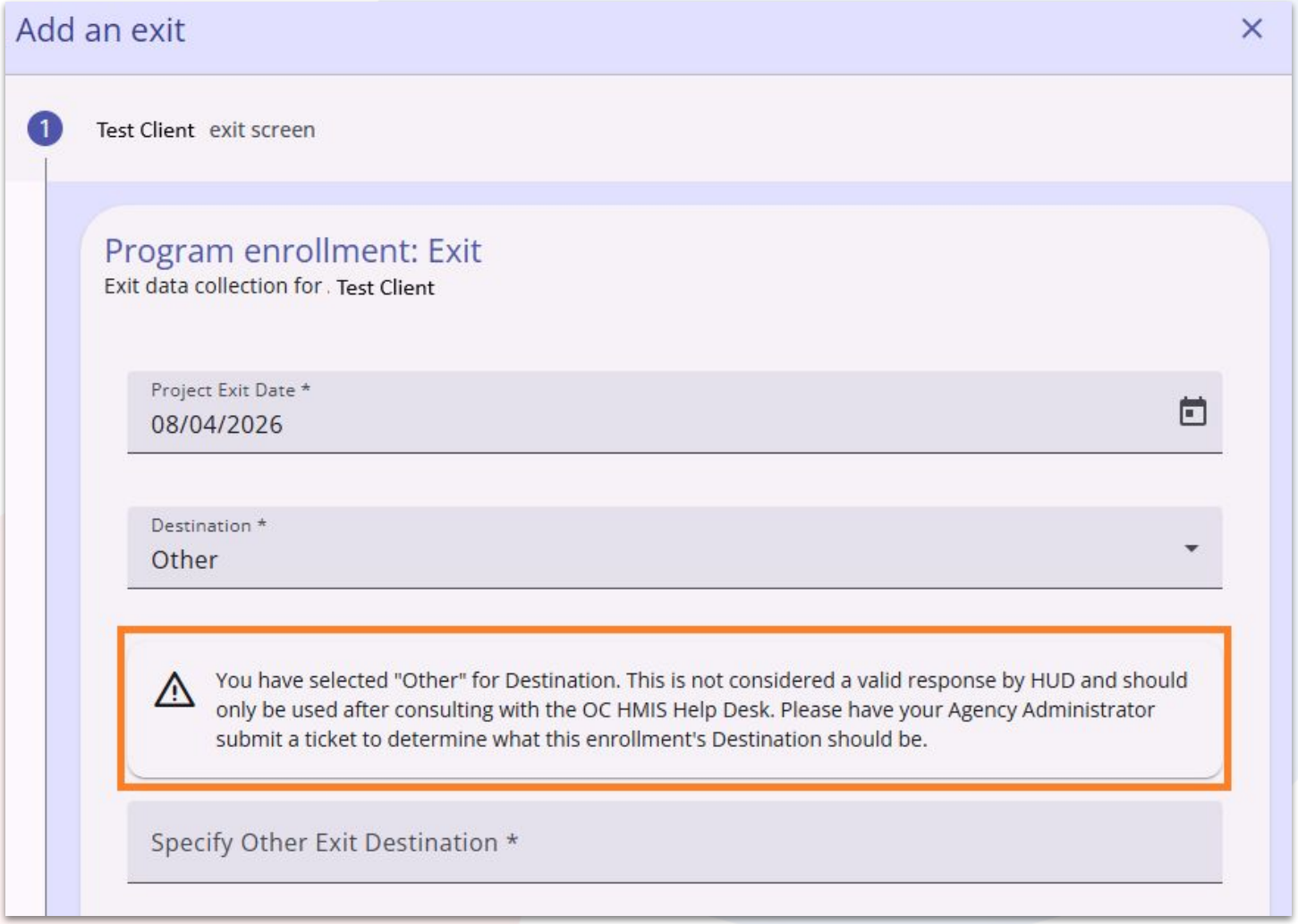
Data Element Highlight: Destination

HMIS users are encouraged to read through the Appendix A – Living Situation Response Categories and Descriptions table from the HUD HMIS Data Standards for a full list of destination options.

No exit interview completed	Viewed as a "missing data" response for data quality and reporting purposes. This response should be used in cases where the client has self-exited the program before the agency could complete the exit interview.
Other	"Other" responses will not count as a positive outcome for any HMIS-based reports. HMIS Users should review this option with HMIS Agency Admin and submit a ticket to the HMIS Helpdesk if additional review support is needed.
Client doesn't know	The client does not know or is unable to share where they plan to stay immediately after they exit the program.
Client prefers not to answer	Client does not want to share where they plan to stay immediately after the exit the program.
Data not collected	Considered a "missing data" response; it implies that no attempt was made to collect the exit destination data during the exit interview process.

Destination Knowledge Base Article

Data Element Highlight: Destination

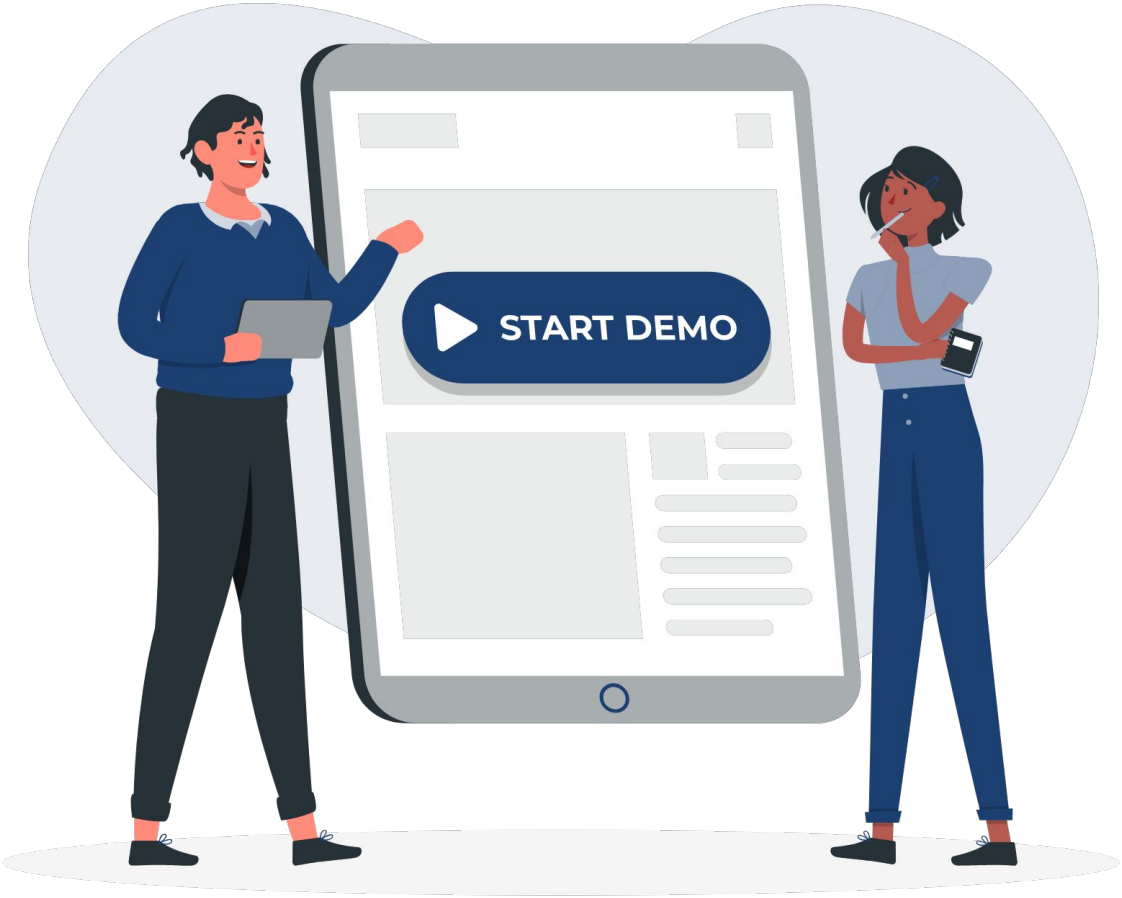


211
Get Connected. Get Help.™

Orange County UNITED WAY

Orange County
UNITED WAY

Destination Element Demo



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

211
Get Connected. Get Help.™

HMIS Funding Form

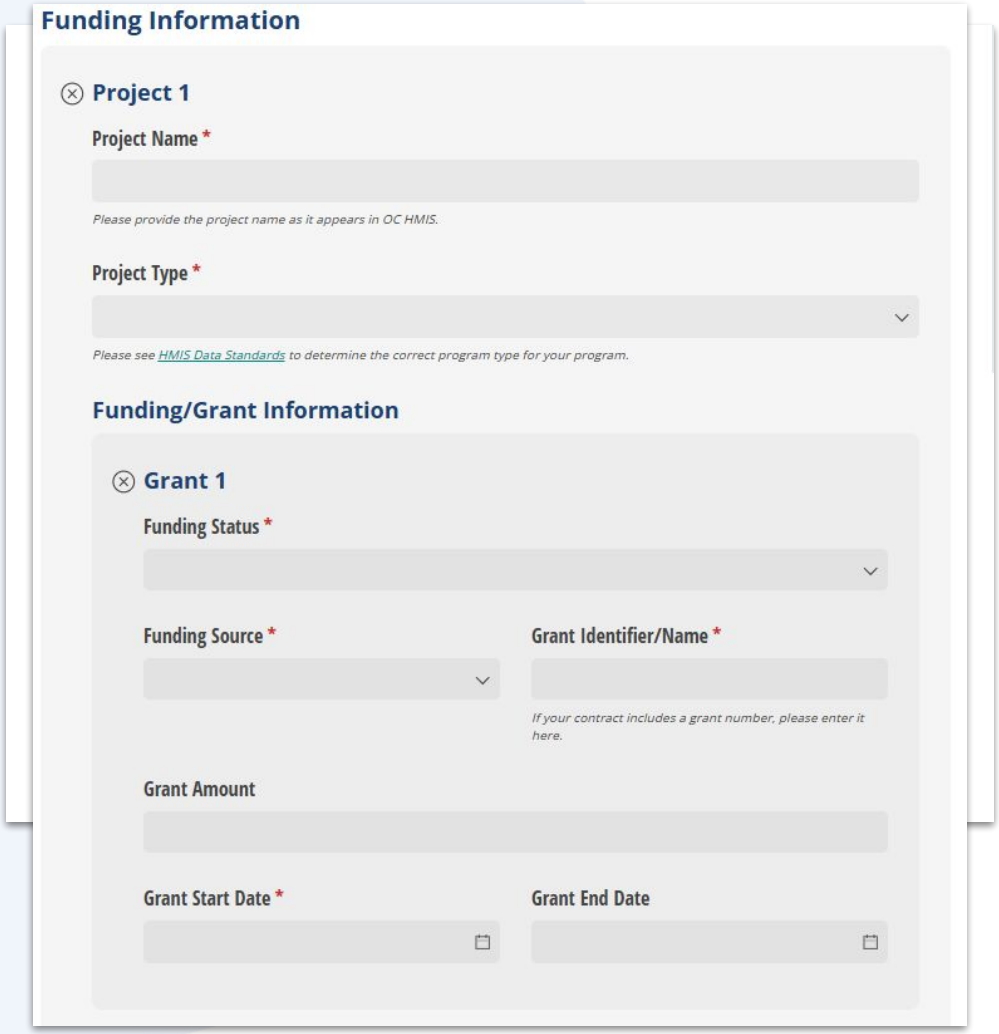
Agency Administrators can submit the Request to Update or Add Funding to Existing Project Form to provide funding information for their existing projects.

Agencies are responsible for submitting an updated Funding Form whenever:

- A new grant is awarded.
- An existing grant or funding source is renewed.
- A funding source changes or is replaced.
- There are any other changes that affect the project's funding information.

Keeping funding information current helps ensure accurate reporting, compliance with funding requirements, and proper system records. Agencies should review their funding information regularly and submit updates as soon as changes occur.

For more information visit ochmis.org > HMIS Forms and Documents > HMIS Data and Set-up Forms > For Agencies/Projects Currently Set-up in HMIS > Add Funding to Existing Project Form.



211
Get Connected. Get Help.™

Orange County UNITED WAY

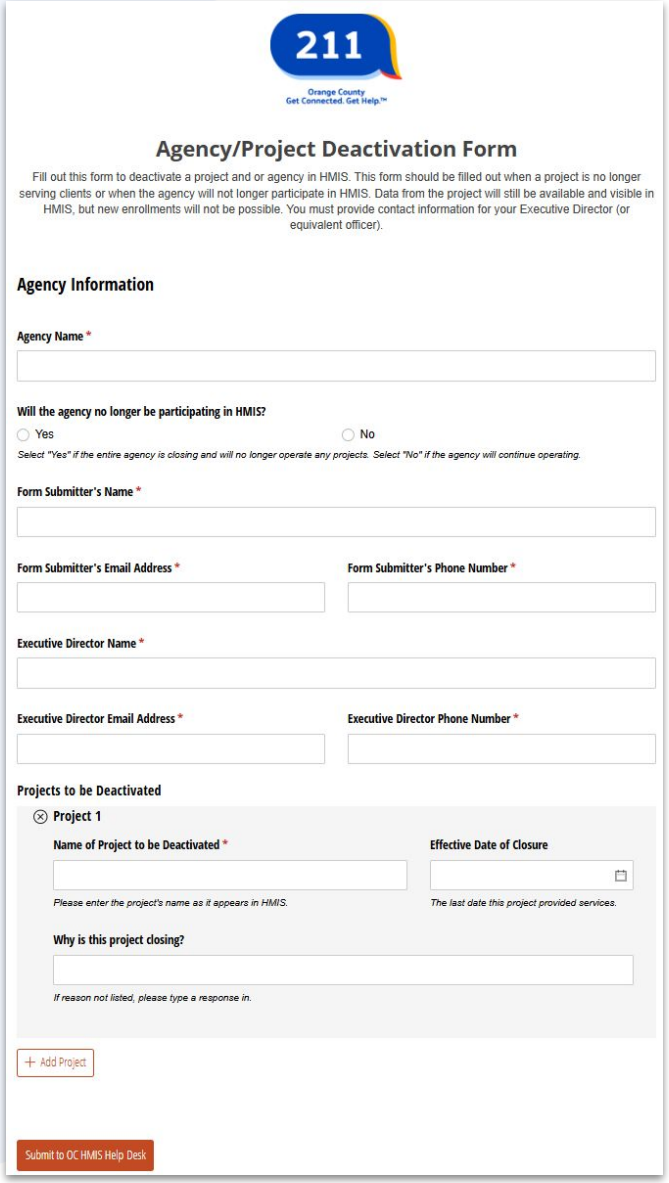
Agency/Project Deactivation Form

Agency/Project Deactivation

The Agency/Project Deactivation Form must be submitted whenever a project is being permanently closed or will no longer provide services. Before requesting a project deactivation, agencies must complete several important steps to ensure the project is closed properly.

Exit All Clients

Before a project can be deactivated, all active clients enrolled in the project must be exited. Client exit dates must be the same as or earlier than the project's Effective Date of Closure. Exit dates cannot occur after the closure date, as this creates data inconsistencies and may delay the deactivation request.



211

Orange County
Get Connected. Get Help.™

Agency/Project Deactivation Form

Fill out this form to deactivate a project and or agency in HMIS. This form should be filled out when a project is no longer serving clients or when the agency will not longer participate in HMIS. Data from the project will still be available and visible in HMIS, but new enrollments will not be possible. You must provide contact information for your Executive Director (or equivalent officer).

Agency Information

Agency Name *

Will the agency no longer be participating in HMIS?

Yes No

Select "Yes" if the entire agency is closing and will no longer operate any projects. Select "No" if the agency will continue operating.

Form Submitter's Name *

Form Submitter's Email Address * Form Submitter's Phone Number *

Executive Director Name *

Executive Director Email Address * Executive Director Phone Number *

Projects to be Deactivated

Project 1

Name of Project to be Deactivated * Effective Date of Closure

Please enter the project's name as it appears in HMIS. *The last date this project provided services.*

Why is this project closing?

If reason not listed, please type a response in.

+ Add Project

Submit to OC HMIS Help Desk

211

Get Connected. Get Help.™

Orange County UNITED WAY

Agency/Project Deactivation Form

Verify Client Exits:

Before submitting a deactivation request, run the Program Roster report to confirm all clients have been exited and there are no active enrollments.

Project Inactivity:

Projects that stop serving clients for 30+ consecutive days must be deactivated, regardless of the reason (funding, staffing, restructuring, temporary suspension, etc.).

For more information visit ochmis.org › HMIS Forms and Documents › HMIS Data and Set-up Forms › For Agencies/Projects Currently Set-up in HMIS › Agency/Project Deactivation Form

Program Roster Report

OC Training Agency
Active within 07/01/2026 thru 07/31/2026

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null, = Non PH Project, **A:** Assessments, **S:** Services, **CN:** Case Notes
You can find more information about adjusted Move-In Date at the Help Center Article

Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: CoC Funded Permanent Supportive Housing Training Project												
Boop, Beep	**6C8B4C427**	03/29/1994	24	32	03/29/2018	07/15/2026	3,030	03/29/2018	0	1	0	
King, Lion	**063F56042**	09/27/1990	27	35	04/02/2018	-	3,043	undefined	0	1	0	
Bee, Bumble	**79D950427**	06/14/1987	30	39	06/05/2018	-	2,979	06/05/2018	0	0	0	
Dean, James	**C2D138403**	06/19/1944	74	82	07/31/2018	07/27/2026	2,918	undefined	0	0	0	
Simpson, Bart	**180C0B49A**	06/19/2008	9	18	02/10/2018	-	3,094	undefined	0	1	0	
Wazowski, Mike	**4B9DC8C38**	01/01/2001	17	25	02/01/2018	-	3,103	undefined	0	0	0	

211
Get Connected. Get Help.™

Orange County UNITED WAY

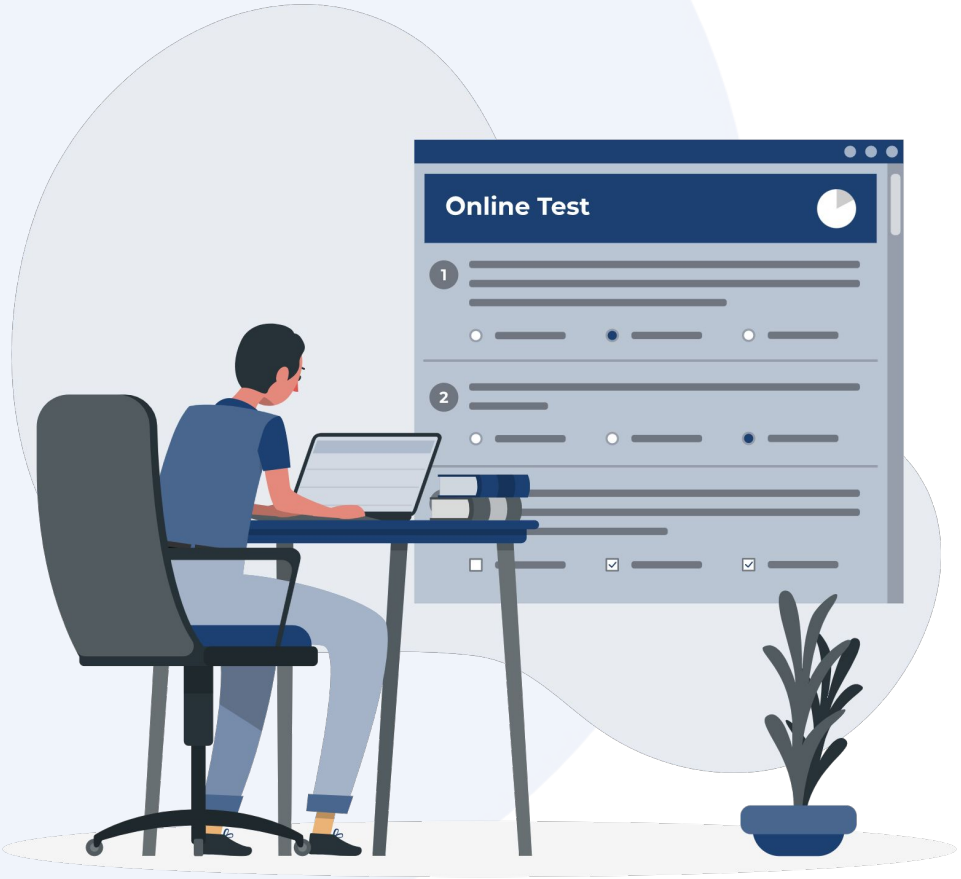
HMIS Recertification

The 2026 HMIS Recertification cycle is now underway.

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.
- Users experiencing login issues should contact their Agency Administrator to submit a ticket to the HMIS Help Desk.

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



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

211
Get Connected. Get Help.™

Orange County UNITED WAY

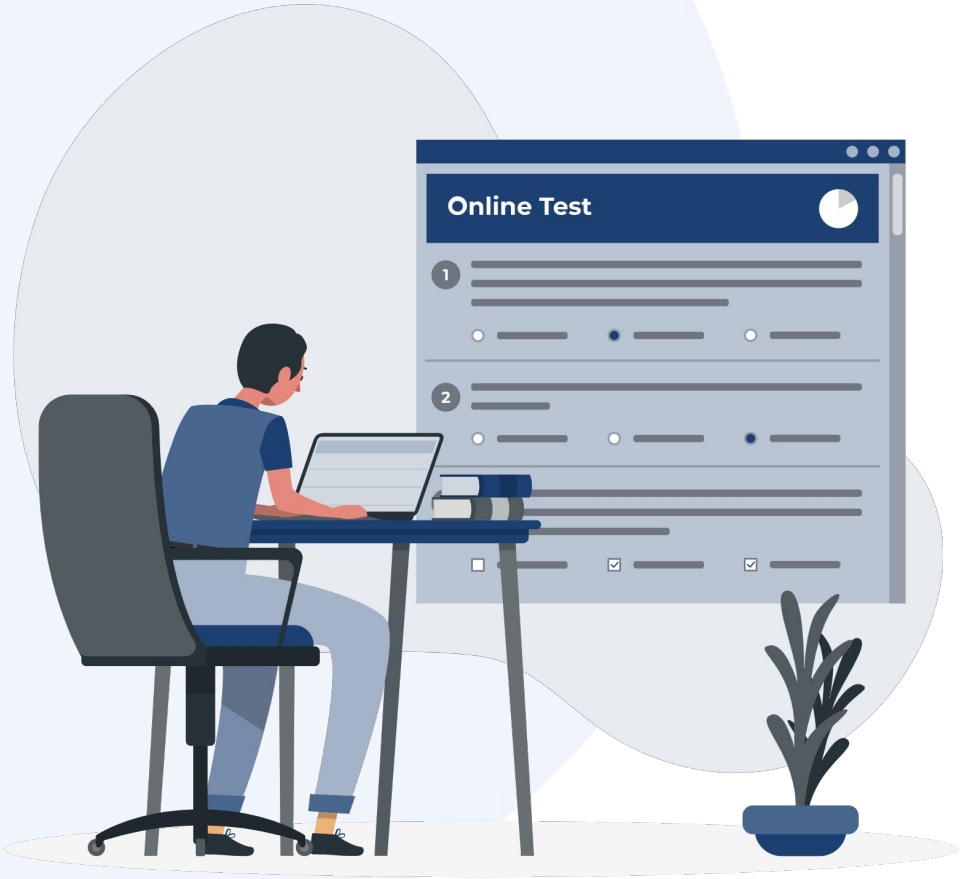
HMIS Recertification & New Clarity Interface

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

- As a reminder, Multi-Factor Authentication (MFA) is required to access the Clarity Training Site. For more information on logging in using MFA, please review the Logging in to Clarity KB.

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

Clarity Updates - New Interface Roll Out

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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Clarity Updates - New Interface Roll Out

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

July 6th

New Interface enabled on OC Training Clarity

User will practice the workflow by completing the HMIS Part 2 Recertication.

July 8th

Live New Interface Training

Materials available on the OC HMIS website.

Aug 2026

New Interface Office Hours

Join Zoom Meeting https://us02web.zoom.us/j/85082779825

Sept 1st

New Interface enabled on OC LIVE Clarity

Oct 1st

Legacy Clarity sunsets

Please keep an eye out for the weekly newsletter recap to review the new functionality of the New Clarity Interface.

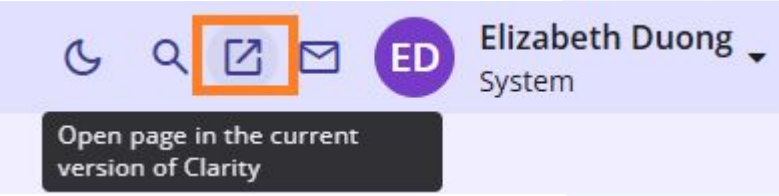
211
Get Connected. Get Help.™

Orange County UNITED WAY

Clarity Updates - New Interface Roll Out

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

The Legacy Clarity will sunset Oct 1st. Users will have 30 days to continue to get familiar with the new interface. User will be able to switch between the two interface until the Legacy Clarity is sunsetted.



Next Steps:

- Complete the HMIS Part 2 Recertificiation to practice the new workflow on the New Clarity Interface
- Complete Bitfocus Clarity Human Services: New Interface Course
- Attend August Office Hours for additional support
- Review July New Interface Clarity Training materials
- Review Clarity's New Look and Common Functions

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

PPR Goal 12 - Limit the Referrals from the Coordinated Entry System that are Denied by Housing Providers

Goal: Permanent Housing projects should not be denying households that are matched to their housing opportunities unless the household is not eligible to be served by the project. However, households may choose to deny a match to a Housing Provider.

Applicable Project Types and Targets:

- Rapid Re-Housing: <= 40%
- Permanent Supportive Housing - Other Permanent Housing: <= 40%

Universe: Denied matches to permanent housing projects during the reporting period

When a household is matched to a housing opportunity, that match can be denied by either the Housing Provider or the Household that was matched to the opportunity. This measure is determining the percentage of all denials that were denied by the Housing Provider.

$$Goal\ 12 = \frac{Matches\ that\ are\ denied\ by\ the\ Housing\ Provider}{Total\ number\ of\ denied\ matches\ to\ permanent\ housing\ projects}$$

211

Get Connected. Get Help.™

Orange County UNITED WAY

PPR Goal 12 - Reasons for Denial

When denying a referral after a household has been matched to a housing opportunity, a reason for denial must be selected.

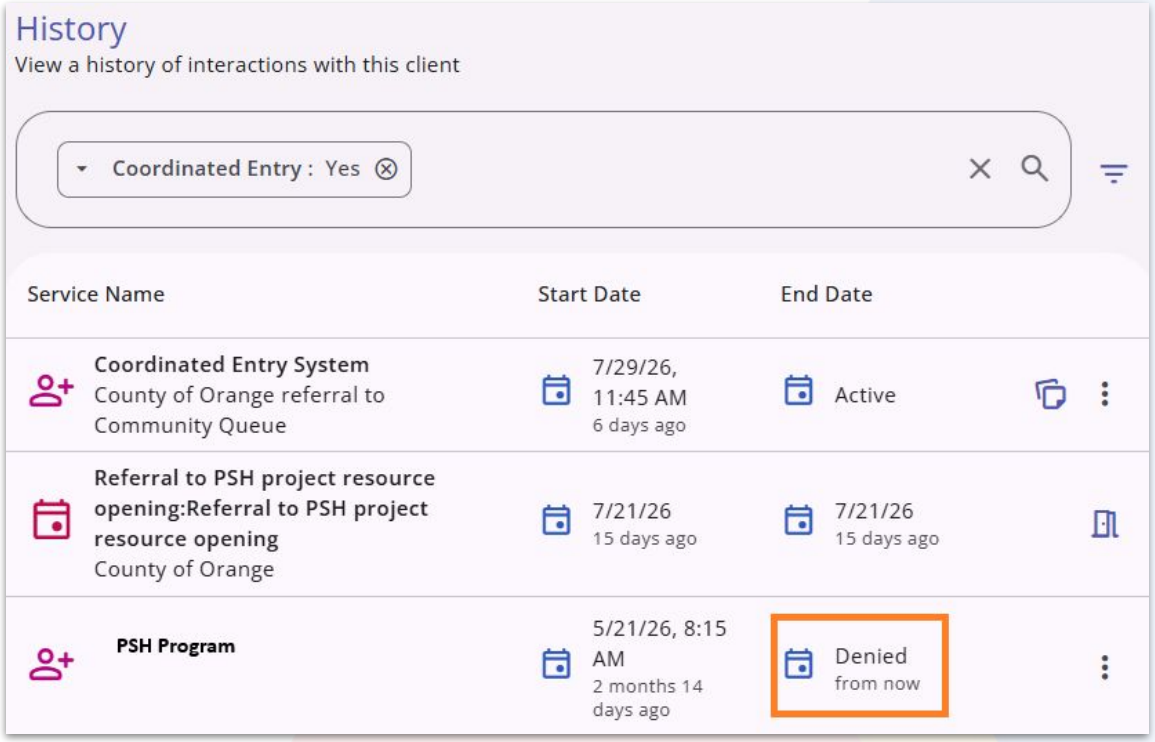
- The table outlines the possible reasons for denial, and whether the reason for denial should be considered by the Housing Provider or the Client.

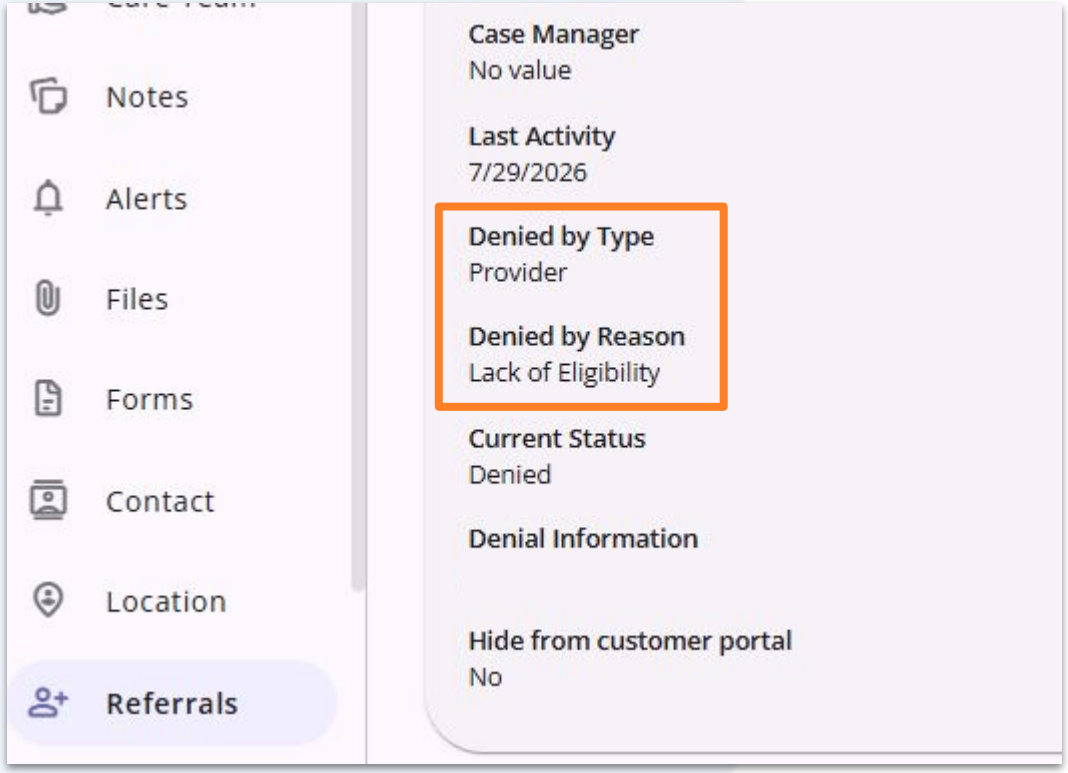
To ensure that you receive matches that meet your housing opportunity eligibility requirements and limit the number of denials, make sure that the toggles for the applicable eligibility requirements are pushed forward when adding housing opportunities.

For additional information about recording denials and setting up housing opportunities, please refer to the Community Queue for Housing Agencies KB.

	Client	Housing Provider
Client Deceased	x	
Client did not show up or call	x	
Client out of Jurisdiction	x	
Client previously received service		x
Client refused services	x	
Denied by Landlord/Property Manager		x
Disagreement with rules	x	
Falsification of Documents	x	
Full Capacity/No Availability		x
Incorrect Match to Agency		x
Lack of Eligibility		x
Needs could not be met by program	x	
Referral time expired		x
Self Resolved - Client Housed	x	
Voucher expired	x	
Other	x	x

PPR Goal 12 - Reviewing Referrals





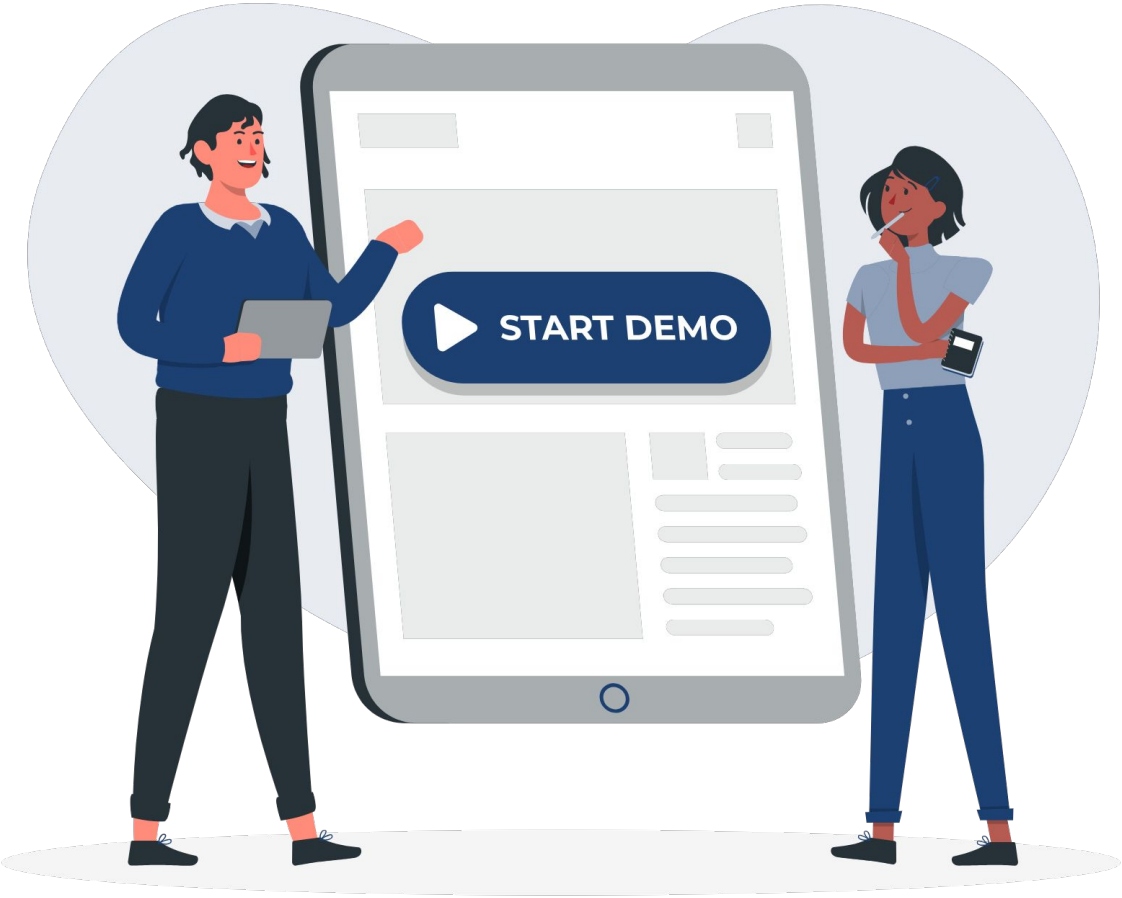
Please review denied referrals from the client's History tab and reach out to the HMIS Team if there are any corrections that need to be made.

211
Get Connected. Get Help.™

Orange County UNITED WAY

Orange County
UNITED WAY

PPR Goal 12 - Demo



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

211
Get Connected. Get Help.™

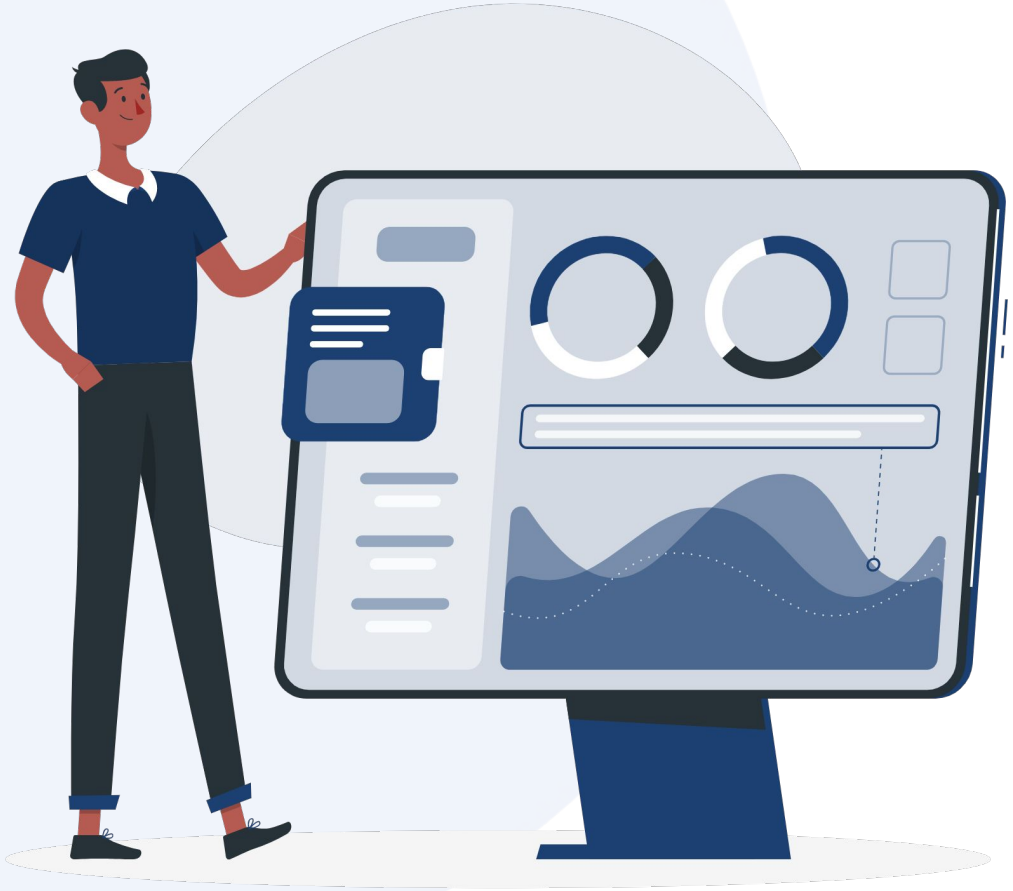
Project Performance Report (PPR)

The Street Outreach (SO) 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 Homelessness Prevention (HP) PPR draft data is available in Dropbox.

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

Training and Resources

New Clarity Interface Office Hours:

- Aug 11th from 10am - 11am
  - Primary Navigation Menu
  - Client Search
  - Client Profile Creation
- Aug 13th from 10am - 11am
  - Program Enrollment
  - Client Navigation Menu
- Aug 18th from 10am - 11am
  - Adding services, notes, assessments and files
- Aug 20th from 10am - 11am
  - Coordinated Entry functionalities: send client to community queue, reviewing and recording an outcome to a referral

Please review the OC HMIS Calendar to find upcoming HMIS meeting and training details.

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

Training and Resources

New Clarity Interface Office Hours:

- Aug 26th from 11am - 12:30pm
  - New Interface Workflow
    - Creating a Client Record
    - Enrolling into a Program and CES
    - Sending and Updating a Referral

- Aug 31st from 9:30am - 11am
  - New Interface Workflow
    - Creating a Client Record
    - Enrolling into a Program and CES
    - Sending and Updating a Referral

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

Please review the OC HMIS Calendar to find upcoming HMIS meeting and training details.

211
Get Connected. Get Help.™

Orange County UNITED WAY

HMIS Data and Performance Management Meeting

The OC HMIS Team will be hosting an HMIS Data and Performance Management webinar on:

Thursday, August 13th @1:00PM

Click here to join!

Agenda:

- Permanent Supportive Housing and Other Permanent Housing
- Rapid Re-Housing
- Transitional Housing
- Q2 Data Quality Report Cards

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

HMIS Team Out of the Office

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

Friday, August 21st, the HMIS Team will attending a company event offsite so the team will be supporting in a limited capacity.

We will be back in the office **Monday, August 24th** to assist you.

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

211
Get Connected. Get Help.™

Orange County UNITED WAY

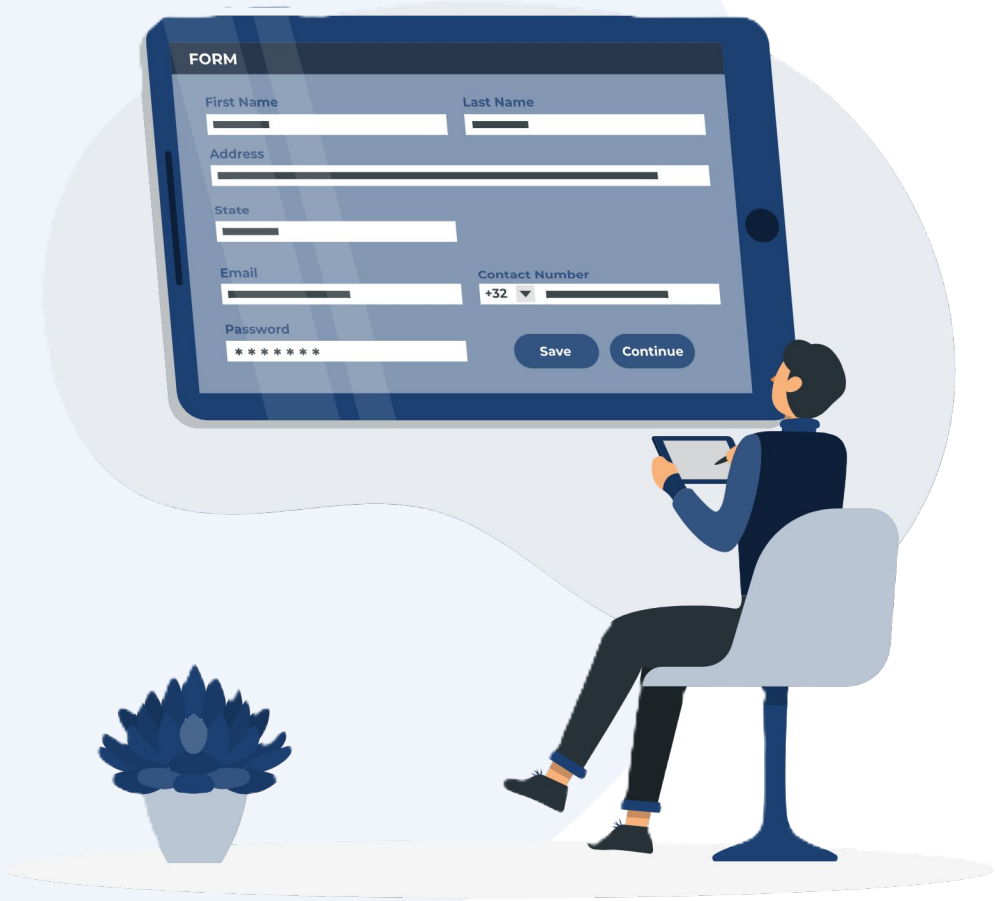
HMIS User Meeting Survey

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/bWaoGzuRYbXp836UA



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

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

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Thank you
Have a great day!

Next User Meeting: September 2nd

211
Get Connected. Get Help.™

Orange County
UNITED WAY

Orange County

UNITED WAY