

OC HMIS User Meeting Webinar Minutes 08/05/26

Contents

Agenda Items	1
HMIS Participating Agencies Schedule	1
HMIS Data Entry & Performance Impact	1
Privacy and Personal Identifying Information Guidance	2
Exiting Clients from a Program	2
Data Element Highlight: Destination	3
HMIS Account Multi Factor Authentication	3
Funding Updates and Project Deactivation	4
Agency/Project Deactivation	4
HMIS Recertification Reminder	5
Project Performance Report	6
Training and Resources	6
Out of Office	7
Survey	7
Q&A	7
Future Meeting Information	7
September 2026 HMIS User Meeting Webinar	7

Agenda Items

HMIS Participating Agencies Schedule

PPR Corrections

- Homelessness Prevention 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 07/01/2024 - 6/30/2026
 - 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](#)

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.

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

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](#)

Exiting Clients from a Program

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](#).

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.

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.

Data Element Highlight: Destination

The Exit Destination element is a Universal Data Element collected for all clients by all project types at 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. Selecting the exit destination 'other' will prompt a soft warning and users are encouraged to contact their agency administrators to submit a helpdesk ticket if they cannot find a destination that even loosely characterizes where the client is exiting to.

Any response of 'Other' will not count in any HMIS-based reporting as a positive outcome.

HMIS users are encouraged to read through the [HUD HMIS Data Standards Appendix A- Living Situation Response Categories and Descriptions](#) table for a full list of destination options and our Destination Knowledge Base Article which provides detailed guidance on the element.

HMIS Account Multi Factor Authentication

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 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.

Funding Updates and Project Deactivation

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](#).

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.

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](#)

HMIS Recertification Reminder

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 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 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.

Project Performance Report - Goal 12

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.

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

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.

Project Performance Report

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.

Training and Resources

New Clarity Interface Office Hours

- August 11th from 10:00AM - 11:00AM
 - Primary Navigation Menu
 - Client Search
 - Client Profile Creation
- August 13th from 10:00AM - 11:00AM
 - Program Enrollment
 - Client Navigation Menu
- August 18th from 10:00AM - 11:00AM
 - Adding Notes, Services, Assessments and Files
- August 20th from 10:00AM - 11:00AM
 - Coordinated Entry Functionality: Community Queue, Reviewing and Recording Referral Outcomes
- August 26th from 11:00AM - 12:30PM
 - Creating Profile Creation
 - CES Program Enrollment
 - Sending and Updating Referrals
- August 31st from 9:30AM - 11:00AM
 - Creating Profile Creation
 - CES Program Enrollment
 - Sending and Updating Referrals

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

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!

The following items will be covered in the agenda:

- Permanent Supportive Housing (PSH) and Other Permanent Housing (OPH)
- Rapid Re-Housing (RRH)
- Transitional Housing (TH)
- Q2 Data Quality Report Cards

Out of 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 li

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

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>

Q&A

No Q&A questions this meeting

Future Meeting Information

September 2026 HMIS User Meeting Webinar

- Date: Wednesday, September 2nd, 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.