

September 2026 OC HMIS User Meeting

211

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Orange County
UNITED WAY

Agenda

1. HMIS Participating Agencies Schedule
2. Clarity Updates - New Interface Roll Out
3. New Clarity Interface Workflow
4. Client Consent Form Update
5. Best Practices for MFA Log in
6. HMIS Policies and Procedures - Community Feedback
7. HMIS Part 2 Recertification
8. Project Performance Report - Goal 13 and 14
9. Project Performance Report
10. Training and Resources
11. Survey
12. Holiday
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.

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

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

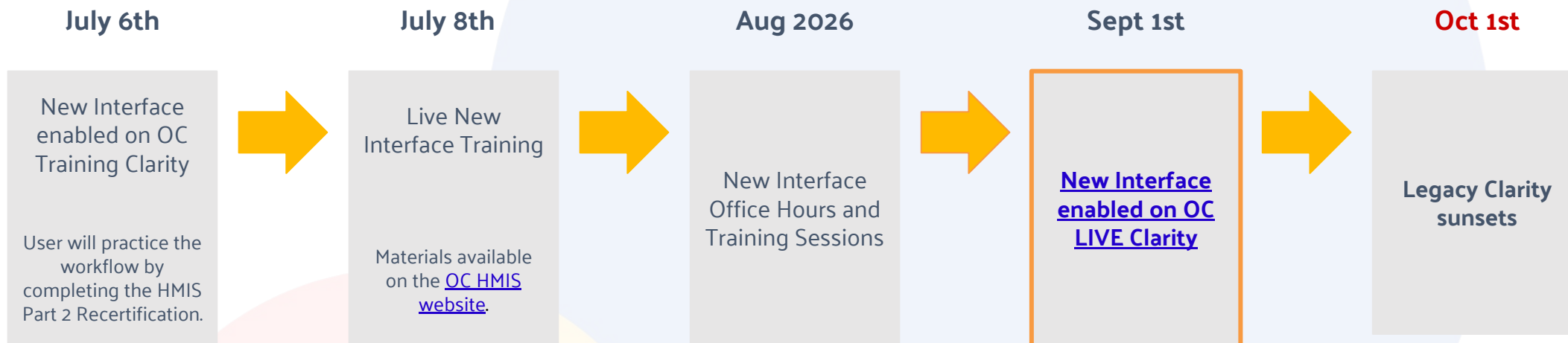
- Project Performance Reports
 - Permanent Supportive Housing & Other Permanent Housing Publication
 - Rapid Re-Housing draft data
- Agency Audits
- System Performance Measure (SPM) and Longitudinal Systems Analysis (LSA) Data Quality Reviews

November

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

Clarity Updates - New Interface Roll Out

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



New Clarity Interface - Client Search

The client search page serves as the default home screen for all users and users can search for client records by utilizing the search bar and entering:

- First name or last name (full or at least first 3 letters)
- Full Unique Identifier
- Full Social Security Number or last 4 digits of Social Security Number
- Date of Birth (e.g. 12/12/1985, 12.12.1985, 12-12-1985)
- Year of birth (e.g. 1985)
- Client ID

A recently accessed clients list can be found below the search bar and retains information about the most recent client records a user has accessed or created.



New Clarity Interface - Client Profile Creation

New client records can be created on the client search page by selecting the **Add (+) icon**.

On the client profile screen that opens, record Universal Data Element about the client. The following fields are required:

- Name
- Social Security Number
- Date of Birth
- Race and Ethnicity
- Veteran Status
- Release of Information Permission

The screenshot displays the Clarity interface for client management. At the top, a navigation bar includes a search icon, a mail icon, and a user profile for Hugo Ambriz at OC Training Agency. A sidebar on the left contains icons for home, search, and other functions. The main content area features a search bar with the text 'Clients' and 'Search for a client'. Below the search bar, a search filter 'lyonel' is entered. A search results table shows one client: 'Baratheon, Lyonel' with ID 'E11D9E426'. To the right of the search results, three summary cards are displayed: '15 Active enrollments', '13 Status due', and '0 Case manager'. A pink arrow points from the 'Add (+) icon' mentioned in the text to the 'Add' button in the search results table.

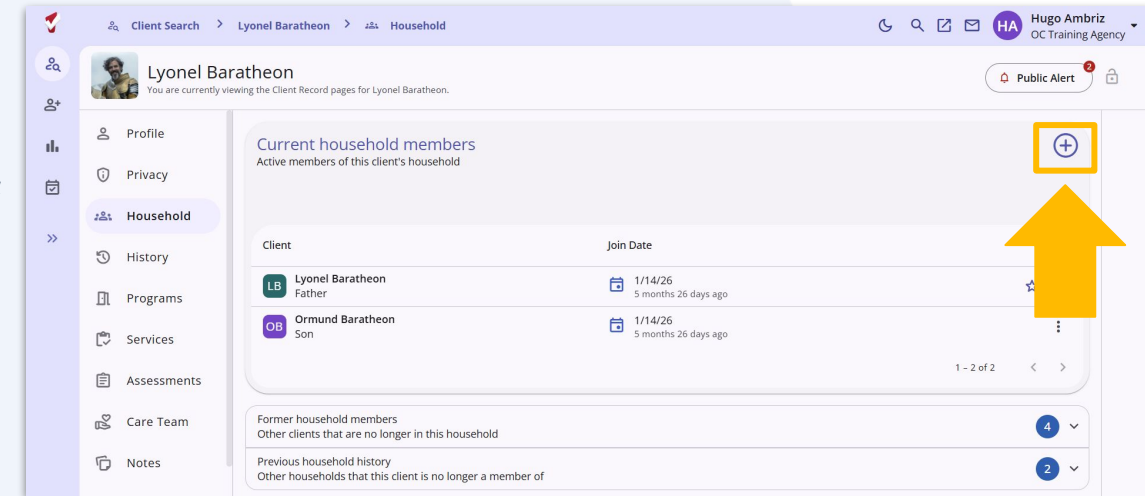
New Clarity Interface - Adding Additional Household Members

In the client record, the client household tab displays the following household information:

- **Current household members:** Active members of the client's household
- **Former household members:** Previous members of the client's household
- **Previous household history:** Prior households the client was a member in

Within the current household members section, users can add new members to the household by selecting the add icon. New household members can be added by:

- Quick add from recently accessed client records
- Client search of existing client records
- Add new client record



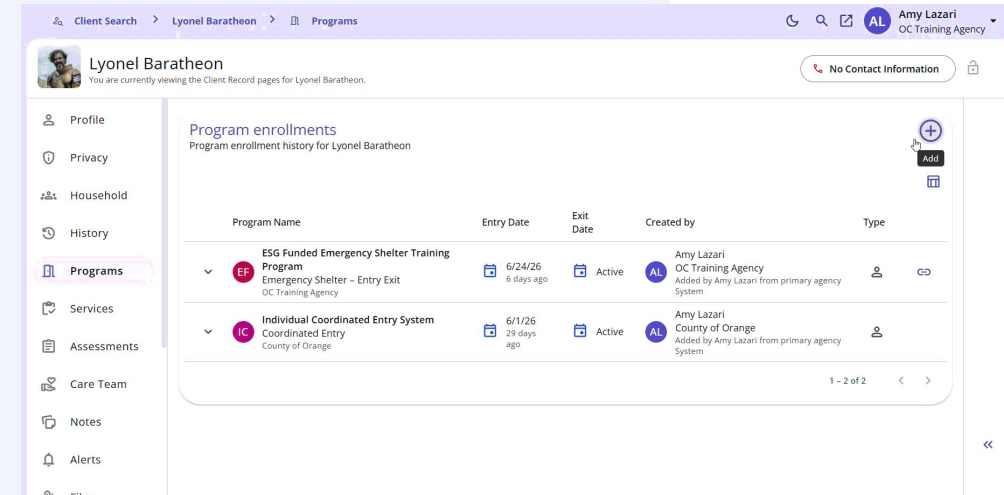
New Clarity Interface - Enrolling into a Program

Creating a new Enrollment

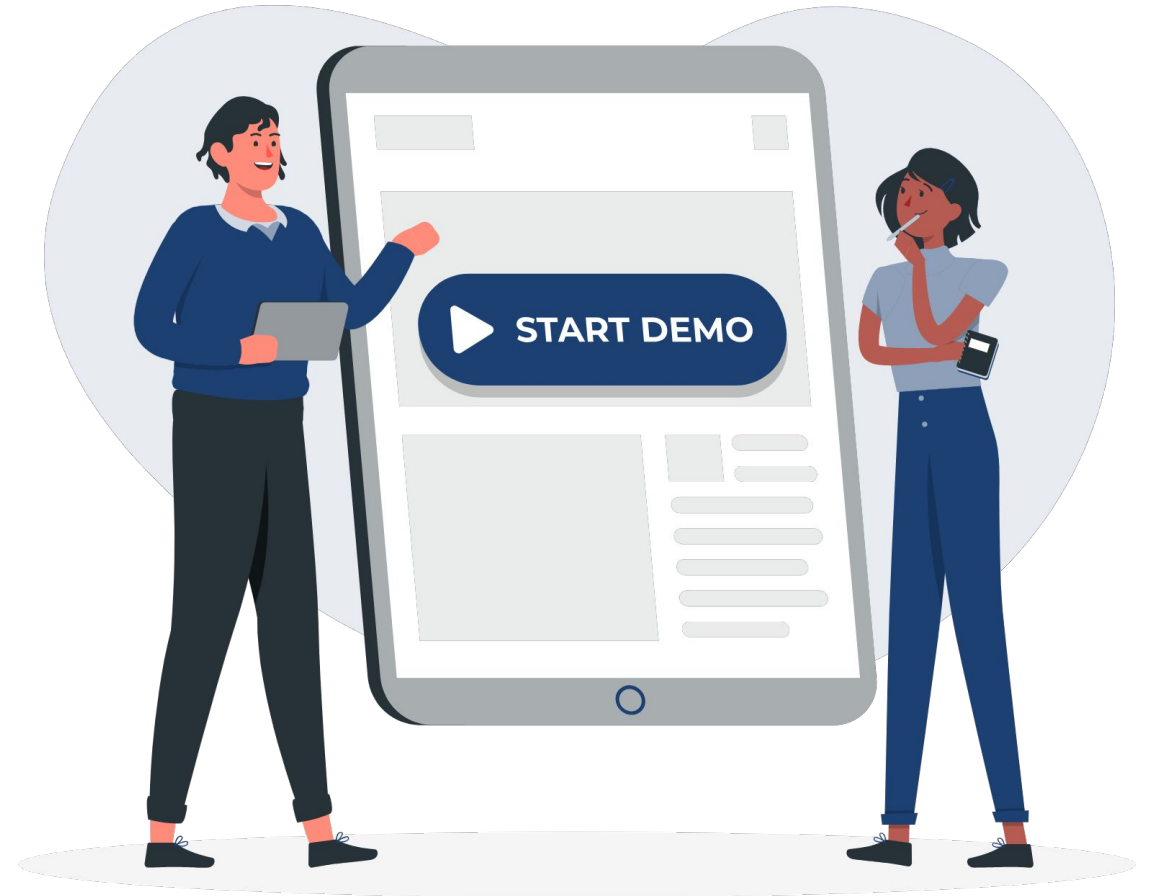
The enroll workflow is broken down into (3) stages:

1. Select the desired project from the list of projects available under the agency, click Next.
2. Add specific members from the client's Global Household to the project enrollment by toggling the button next to their name, click Next.
3. Complete the enrollment screen for each client joining the project, click Save and Complete.

Once the enrollment information has been completed for each member joining the project, the enrollment will appear under each client's program enrollment history.



New Clarity Interface Workflow Demo



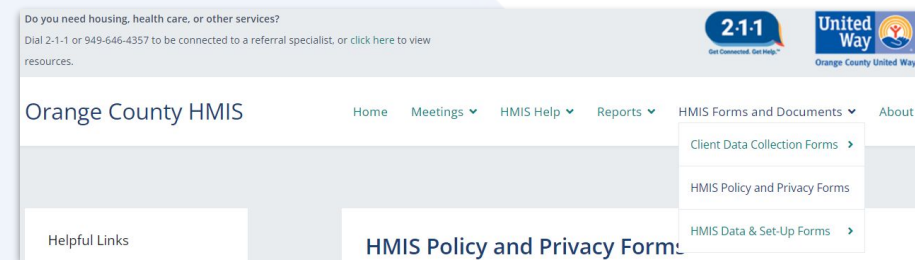
Graphic by: <https://storyset.com/online>

Client Consent Form Update

The final page of the HMIS Consent to Share Protected Personal Information Form has been updated to reflect changes in the roster of HMIS participating agencies.

This form can be found on [our website](#) by navigating to: [HMIS Forms and Documents](#) > [HMIS Policy and Privacy Forms](#) > Consent to Share Protected Personal Information

A complete list of all agencies that participate in OC HMIS can be found at: <https://ochmis.org/contributing-agencies/>



HMIS Policy and Privacy Forms

HMIS Policies and Procedures	English		
HMIS User Agreement	English		
Consent to Share Protected Personal Information	English	Spanish	Vietnamese
Note Regarding Collection of Personal Information	English	Spanish	
Privacy Notice	English	Spanish	Vietnamese
Grievance Form	English	Spanish	
Client Revocation of Consent Form	English	Spanish	

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Best Practices for MFA Login

As part of our vendor's mandatory Multi-Factor Authentication (MFA) roll-out, users are now required to enroll in an MFA method to login to their Clarity HMIS accounts. Users can enroll in the following MFA methods: authenticator app, phone number, or email address.

If a user submits multiple incorrect password attempts or authentication codes, Clarity HMIS will automatically lock that user's account. If this occurs, the user must contact their agency admin(s) to submit a ticket to the HMIS Help Desk to have their account unlocked. Agency Admin(s) must inform the Help Desk team to which account was locked (live account or training account).

When logging-in, if a user receives an error message that states "Unable to log in. Please reach out to your System Administrator" then they should clear their browser cache and restart their computer. If the error still persists, users must contact their agency admin(s) for additional support.

For more information about this topic, please reference our [Troubleshooting Logging into HMIS](#) KB article.

HMIS Policies and Procedures - Community Feedback

Steps to provide feedback:

1. Download the documents and add comments. A summary of the proposed changes is available [here](#) to assist with review. Some documents do not have any proposed revisions from the working group, but are still open for community feedback.
2. Submit a ticket to the [HMIS Help Desk](#) with the category Feedback selected from the dropdown list option. Feedback may be submitted as comments on the documents or written in the ticket.

[OC HMIS Policies and Procedures and HMIS Documents](#)

Thank You OC HMIS Policies and Procedures Working Group

- Pathways of Hope
- VOALA
- Salvation Army
- PATH
- SPIN
- Grandma's House of Hope
- Family Promise of Orange County
- City of Irvine
- Office of Care Coordination
- CoC Board representation
- LEAC representation



HMIS Part 2 Recertification

The HMIS Recertification is completed for 2026.

- Users that did not complete the test by August 31st had their HMIS accounts set to inactive.
- If your HMIS account was set to inactive you have until Sept 18th to complete the following trainings:
 - **All HMIS Users**, including Read Only Access, will be required to complete the [2026 HMIS Privacy and Security online course](#).
 - **Users with data entry access** will also be required to take the [2026 HMIS Part 2 Recertification Skills Test](#)
 - Users with Read Only accounts are excluded.

Users that miss the Sept 18th deadline, will need to retake the HMIS Part 1 and Part 2 training courses in addition to the HMIS Skills Test. This only applies to users that were on the HMIS Recertification list for 2026.



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PPR Goal 13- Accept Matches from the Coordinated Entry System Quickly

Goal: Once a household is matched to a housing opportunity, the Housing Provider should determine whether or not the household is eligible and start working with the household on their housing placement as soon as possible in order to shorten the time a household is experiencing homelessness.

Applicable Project Types & Targets:

- Rapid Re-Housing ≤ 14 days
- Permanent Supportive Housing- Other Permanent Housing ≤ 45 days

Universe: Head of households with a completed referral to a Housing Provider during the reporting period.

- This measure is determining the number of days between the date a household was matched to a housing opportunity and the head of household's Project Start Date in the housing project.

PPR Goal 14- Successfully Match Households to a Housing Provider

Goal: Housing Providers should communicate with the CES leads to ensure that households are being appropriately matched to their housing opportunities.

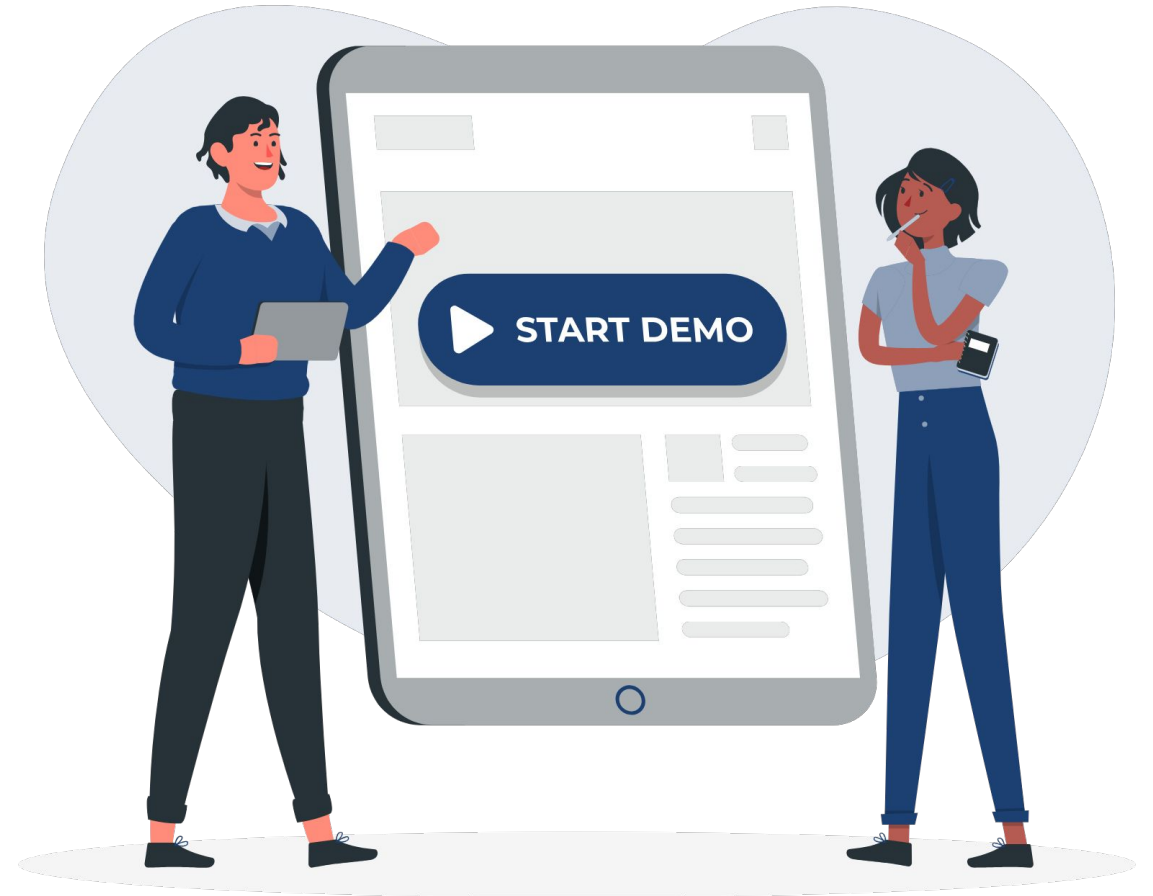
Applicable Project Types & Targets:

- Rapid Re-Housing $\geq 60\%$
- Permanent Supportive Housing- Other Permanent Housing $\geq 50\%$

Universe: Head of households with a completed referral to a Housing Provider during the reporting period.

- When a household is matched to a housing opportunity, the match results in either a completed referral, which is an enrollment in a housing project, or a denied referral, which means that either the Housing Provider decided that they could not serve the household, or the household decided they did not want to be served by the Housing Provider. Households that disappear or are otherwise unable to be contacted are also considered denials by the household. This measure is determining the percentage of matches that resulted in an enrollment in a housing project.

PPR Goal 13 and 14 Demo



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Project Performance Report (PPR)

The Homelessness Prevention (HP) PPR 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 Permanent Supportive Housing & Other Permanent Housing 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.



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Training and Resources

- Federal Reporting Office Hours
 - Thursday, 9/17 at 10am - 11am
 - <https://us02web.zoom.us/j/85082779825>
- New Clarity Interface Workflow Training
 - Thursday, 9/24 at 10am - 11:30am
 - <https://us02web.zoom.us/j/87669430611>
- HMIS Reporting Training PPR Goal 11 - 14
 - Wednesday, 9/30 at 10am - 11:30am
 - <https://us02web.zoom.us/j/89991082140>

Meeting information and links available from the [OC HMIS Calendar](#)

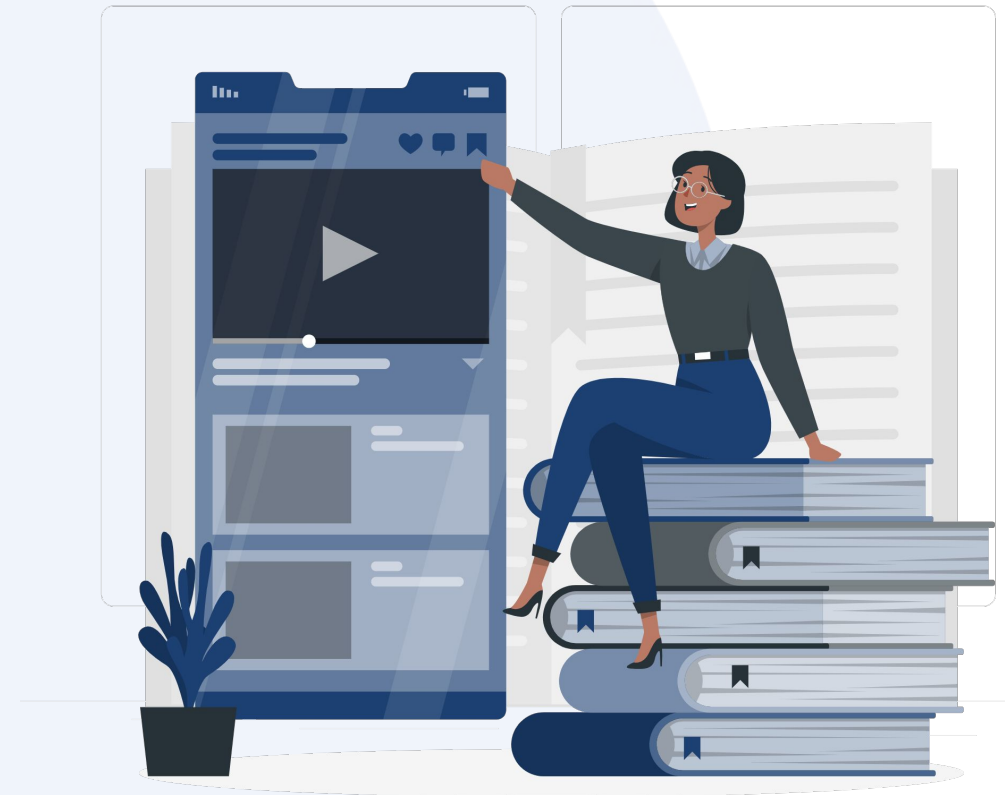


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Training and Resources

- Updated KBs - New Interface Workflow:
 - [Searching For a Client Record](#)
 - [Adding Client Profiles to HMIS](#)
 - [Enrolling Clients in a Project](#)
 - [Exiting Clients from a Project](#)
- [July and August New Interface Office Hours and Training Materials:](#)
 - Clarity New Interface Workflow Training
 - Primary Navigation Menu
 - Client Navigation Menu
 - Client Search + Profile Creation
 - Household Composition
 - Program Enrollment Creation
 - Services, Assessment, Notes, and Files
 - Access Point CES Workflow
 - Housing Provider CES Workflow

ochmis.org > HMIS Help > HMIS Recorded Trainings



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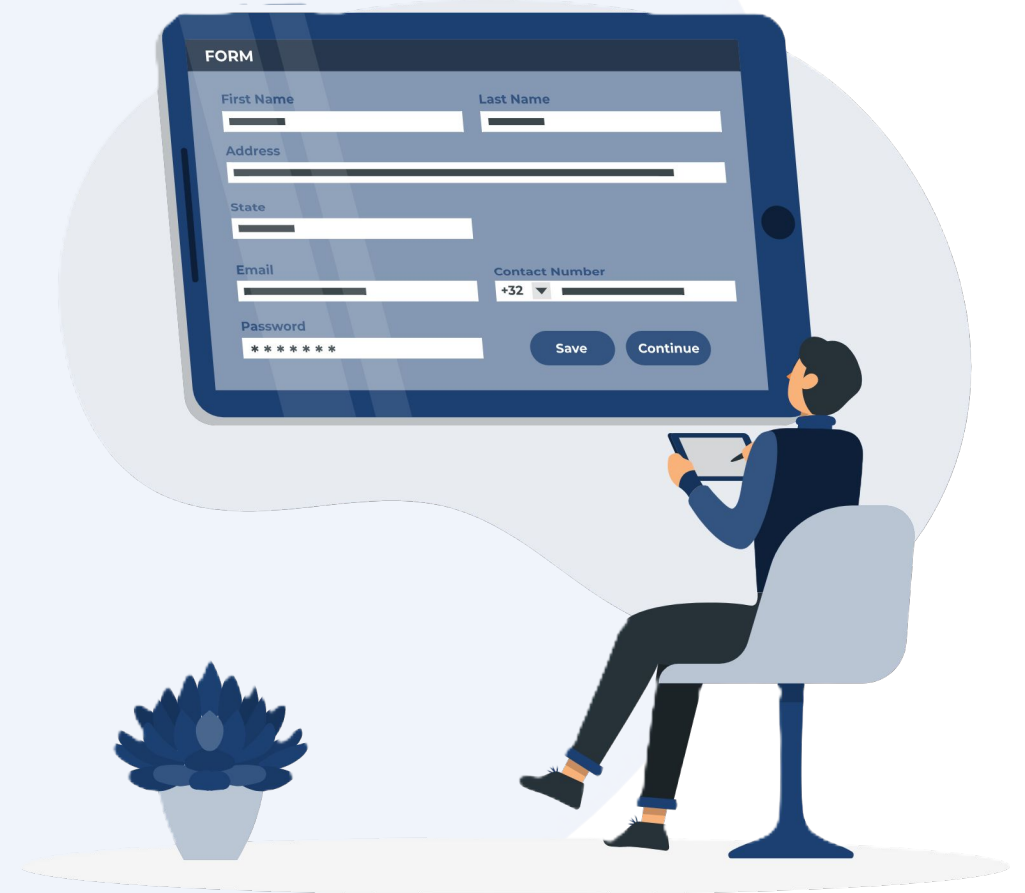
HMIS User Meeting Survey

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/Em5vkBaC6nt4UXFYA>



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Holiday

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

Monday, September 7th in observance of Labor Day.

We will be back in the office **Tuesday, September 8th** 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: October 7th





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