OC HMIS User Meeting Webinar Minutes
10/07/26

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Agenda Items

HMIS Participating Agencies Schedule

PPR Corrections

- Rapid Re-Housing 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 09/01/2024 - 8/31/2026
    - 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

Client Reports

- Client Reports are now available in the New Clarity Interface.
- To run, navigate to the *Reports* tab under the client navigation menu. Common reports that are available to run include: Case Notes, Client History, and Homeless Status Timeline.

Preview Files

- Previewing client files is now available in the New Clarity Interface.
- To preview, navigate to the *Files* tab under the client navigation menu, hover over the *PDF icon*, and click *Preview*, a pop-window will appear with the file.

When to Exit Members from Global Household

The Global Household is the household composition for the client's profile, where a client can only be a member of one and only one global household.

A household member may need to be exited from the Global Household when they are no longer part of that household. Examples of this include, if there is a separation between a couple, an adult child leaves the household, a household member passes away, etc.

To exit a household member, navigate to the *Household* tab under the client navigation menu, click on the household member that needs to be exited, a pop-window will appear, click on the *pencil icon* to edit, enter the exit date and click *Save*.

Data Element Highlight: 3.917 Prior Living Situation

Prior Living Situation is split into 3.917a and 3.917b. The element is collected to identify the type of living situation and the length of stay in that situation immediately before program entry.

This Universal Data Element (UDE) is used with other collected data to identify whether a client may meet criteria for experiencing chronic homelessness at different points of enrollment.

For additional resources on this element, please refer to our Knowledge Base articles 3.917 A, 3.917 B and guidance from HUD.

3.917b incorporates conditional logic so homelessness history fields are only collected when required, including situations where:

- They are entering from other living situations where they reside less than 7 days and were immediately homeless before that.
- They are entering from an institution where the stay was less than 90 days and were immediately homeless before that.

Client Unique Identifier

The HMIS Team requests that Agency Administrators please use the client's Unique Identifier (UID) when submitting the fictitious client numbers for the Skills Test as well as for any general live Clarity support tickets.

Federal Reports: LSA and SPM Timeline

Longitudinal System Analysis (LSA):

An annual report which includes demographic, performance, and household composition information, as well as patterns of system use. The LSA from each CoC is consolidated to create the AHAR that is submitted to Congress.

System Performance Measures (SPMs):

Measures the performance of a Continuum of Care (CoC) as a whole in meeting the needs of people experiencing homelessness. Six measures comprise the SPMs, which are used as competitive elements in annual CoC Program Competitions.

Both reports are covering the following reporting period of 10/1/2025 - 9/30/2026

- The following timeline is specific to LSA but during the meeting our team will also review SPM data corrections as all data clean rolls into all federal reporting.
- HDX 2.0 officially opens Nov 10th for our HMIS Team to start the initial upload.
- From Nov 13th - 15th - we ask that our HMIS participating partner agencies support with data corrections and reviewing warning flags to share an explanation. Our HMIS Team will also reach out to schedule one on one time with agencies to conduct a deeper dive into the errors and flags and discuss next steps to process the corrections.
- During Dec 2nd - 12th, if there are any additional pending corrections our team will send out another round of corrections and flags.
- If HUD TA requests additional information, our HMIS Team will reach out to agencies during Dec 22nd - 31st as needed to request additional support with LSA warning flag explanations.
- Our HMIS Team aims to prepare to submit the LSA Jan 5th.

Since our focus has been on Data Quality, we have been sending to agencies corrections they can make to improve their scores. We have completed Round 1 of corrections and will be sending out additional corrections to review in Round 2.

During Round 2, on Oct. 6, your agency administrator will be receiving notification of these errors which they will find in their agency's Dropbox. We will be reaching out to schedule a one-on-one meeting between October 6 – 23rd with agencies to go over the errors and understand how to make corrections. If you have already met with our HMIS Team, there is no need to schedule another meeting, unless you wish. Agencies who have not met with us yet are strongly encouraged to schedule some time.

All agency corrections will be completed in HMIS by October 30th.

Data Quality Dashboard

The Data Quality Dashboard is an important tool that users can reference when reviewing data competition and data quality. The dashboard will highlight specific issues related to the following:

- Universal Data Elements
    - Profile Screen, Enrollment Screen
- Program Specific Data Elements

    - Income, Insurance, and Disability
- Federal Partner Program Data Elements
    - HOPWA, PATH, RHY, and SSVF/VA

The Data Quality Dashboard is primarily used to count the number invalid responses recorded for the Universal, Program, and Federal Partner Data Elements. Invalid responses include:

- Client doesn't know
- Client prefers not to answer
- Data not collected

Users can locate the dashboard by navigating to:
Reports > Data Analysis > Built In Reports > Data Quality Dashboard

Performance Report

The Permanent Supportive Housing & Other Permanent Housing PPR will be published on our website this month, in October.

Current and past PPRs can be found on the Orange County HMIS website by navigating to: Reports > Project Performance Reports

Corrections for the Rapid Re-housing PPR draft data will also be available in Dropbox to review.

The Project Performance Overview is a helpful document that provides important information regarding the PPRs including the thresholds for reach goal and publishing schedule.

Training and Resources

HMIS Data Collection and Review: 3.917 Prior Living Situation

Oct 21st, 2pm - 3:30pm

https://us02web.zoom.us/j/83714684154
Meeting ID: 837 1468 4154

Office of Care Coordination and PATH are hosting a Coordinated Entry System Documentation Webinar

Oct 29th at 3:30pm - 4:30pm

Teams Webinar Link

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/1axp92TU5e9FZkr69

Q&A

Clarity Updates - Preview Files

- Q: Will we be able to view all the files posted there now (unless they are marked private)?
    - A: Yes, that is correct.

Future Meeting Information

November 2026 HMIS User Meeting Webinar

- Date: Wednesday, November 4th, 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.