OC HMIS User Meeting Webinar Minutes
09/02/26

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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

Clarity Updates - New Interface Roll Out

New Interface enabled on OC LIVE Clarity

New Clarity Interface Workflow

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 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

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

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.

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/

Best Practices for MFA Log in

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 updated Troubleshooting Logging into HMIS KB article.

HMIS Policies and Procedures - Community Feedback

The HMIS Policies and Procedures has been reviewed by the working group and those revisions are now available for feedback from the community.

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 members:

- 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.

Project Performance Report - Goal 13 and 14

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 >= 60%
- Permanent Supportive Housing- Other Permanent Housing >= 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.

Project Performance Report

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.

Training and Resources

The following Trainings will be hosted during the month of September:

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

Updated OC HMIS Knowledge Base Articles - 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

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

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.

Q&A

HMIS Part 2 Recertification

- Q: Can you just clarify which training should new staff be taking? Are they the same as before with HMIS Recertification ?
    - A: Please review the New Staff On-boarding Knowledge Base Article: https://ochmis-211oc.happyfox.com/kb/article/250-new-staff-onboarding/

HMIS Annual Recertification is conducted annually between July-Aug for any users whose account was created and stayed active from the year prior through July.

Required training will depend on which access role type the user will need.

Future Meeting Information

October 2026 HMIS User Meeting Webinar

- Date: Wednesday, October 7th, 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.