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# Welcome!

January 2025  
OC HMIS User Meeting



# Agenda

1. HMIS Participating Agencies Schedule
2. HMIS User Fee
3. New Staff Onboarding
4. Troubleshooting HMIS Log In
5. Inactive Users
6. Ticket Submission Categories
7. HappyFox Account
8. Client Record Request
9. HIC and Sheltered PIT
10. Project Performance Report
11. Data and Performance Meeting
12. DropBox Clean Up
13. Updated HMIS Consent Form
14. Trainings
15. Holiday
16. Q&A
17. Office Hours

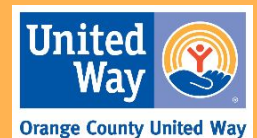
Meeting materials and recording will be available on the [OC HMIS website](#)

# 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, 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												
Orange County Requirement	HMIS User Recertifications	July	August	n/a	n/a												
	HMIS Lead Meetings	Monthly meetings on 1st Wednesday @ 10:00	n/a	n/a	n/a												
	Data & Performance Management Meeting	Quarterly meetings on 2nd Wednesday @ 10:00	n/a	n/a	n/a												



## 2025 HMIS User Fees

- Agencies will receive invoices for 2025 HMIS User Fees in the upcoming weeks
- Payment due 60 days from date of invoice
- OCUW 211OC will send over the invoice and list of users via email for Agency Admin and Finance Staff to review



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# New Staff Onboarding Process

**Step 1:** HMIS Training Courses - New staff will need to create an account & complete the [HMIS Training Courses](#). \*Courses are dependent on a user's access role. See [New Staff Onboarding KB](#) for more details.\*

**Step 2:** Confirm - When the training courses are completed, please verify their completion by selecting the "My Achievements" tab under My Online Courses. →

## My Online Courses

[Dashboard](#) • [My Courses](#) • [My Grades](#) • [My Memberships](#) • [My Achievements](#) • [My Certificates](#) • [Notifications](#) • [Edit Account](#) • [Redeem a Voucher](#) • [Order History](#) • [Sign Out](#)

## My Achievements



The screenshot displays three achievement cards, each with a graduation cap icon and the text "Congrats!".

- HMIS PART 2 TRAINING COMPLETE**  
HMIS Part 2 Training Complete!
- HMIS PART 1 TRAINING COMPLETE**  
HMIS Part 1 Training Complete!
- COORDINATED ENTRY TRAINING COMPLETE**  
HMIS Coordinated Entry Training Completed!

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# New Staff Onboarding Process

**Step 3:** Skills Test - User will get the Shared Agency Training Account credentials from the Agency Admin (AA), complete the Skills Test, and then the AA submits the test via the [HMIS Account Update & Testing Form](#).

**Step 4:** Account Creation - The HMIS Help Desk scores the form, creates the user account and notifies the Agency Admin.



## HMIS Account Update & Testing Form

### Agency Information

Agency Name \*

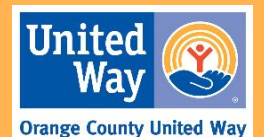
Agency Administrator Name \*

Agency Administrator Email \*

List any other email addresses to send a notification when this account is created.

⊗ HMIS User 1

HMIS User's Full Name \*



# Troubleshooting HMIS Log In

Here are some common ways to troubleshoot if you or your users are having difficulty logging in to Clarity.

**Website-** OC Clarity Live, LA Clarity Live or Clarity Training Site?

**Username** - Either your username or email address can be used to log in.

**Email Folders** - Check junk and quarantine folders. Give 10 minutes for the auto generated password reset email to appear.

**Adding Domain:** Add the following domain to the Safe Senders list:

[noreply@bitfocus.com](mailto:noreply@bitfocus.com)

Other helpful tips:

- Add a calendar reminder to login every 30 days to prevent the system from auto-inactivating your account at the 60 day no activity mark.
- Bookmark Clarity Live sites and Clarity Training site for ease of use.

For more information, please refer to the [Troubleshooting logging into HMIS](#) knowledge base article



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# Inactive Users

Agency Admins should keep an up to date record of all active users at their agency. When users leave an agency, agency admins must submit an [HMIS Account Update & Testing Form](#) on those users behalf to have those accounts deactivated.

Agency Admin may run the Agency Active Users report to review a list of active users as needed.

- Pathway: Reports > Data Analysis > Orange County Clarity System Reports > User Management

Account deactivation requests should be submitted to the HMIS Helpdesk immediately, or within 1 business day of the user's exit from the agency.

⊗ HMIS User 1

HMIS User's Full Name \*

HMIS User's Email Address \*

This HMIS User Is: \*

- A new HMIS User
- Completing HMIS training again due to inactivity
- An existing and active HMIS user who needs Agency Administrator access
- An existing and active HMIS user who needs access to the Individual Coordinated Entry System
- An existing and active HMIS user who needs access to the Family Coordinated Entry System
- An existing and active HMIS user who needs access to both Family and Individual Coordinated Entry Systems
- An existing and active HMIS user who needs access to my agency
- An existing and active HMIS user who needs a different access role (specify change of access role in comments)
- No longer employed by our agency
- No longer in need of access to HMIS as part of their primary job duties
- Other

Was the user whose HMIS account is being deactivated an Agency Administrator or Backup Agency Administrator? \*

Yes  No

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# Ticket Submission Categories

When submitting tickets to the HMIS Helpdesk, agency admins should be mindful to select the appropriate ticket category for their requests. Selecting the wrong ticket category may cause delays in the HMIS Helpdesk's ability to process tickets. Agency admins can select from the following ticket categories:

- **Agency or Project Setup** - Request to set up a new project, or questions about a project setup
- **Client Record Merges** - Request to merge duplicate client profiles, or questions about profile merges
- **Client Record Request** - Use when a client requests their HMIS record, use UID for identification
- **Feedback** - Use to respond to HMIS surveys, or for other community feedback initiatives
- **HMIS Functionality Issues** - Use for troubleshooting HMIS errors staff members encounter
- **Reports (including repository exports and corrections)** - Request new reports, or to provide updates/corrections to existing reports; Use for questions about *LSA*, *SPM*, *HIC/PIT*, *DQRC* and *PPR*
- **Users and Trainings** - Requests to reset trainings courses, or for questions/issues encountered about the user onboarding process

Agency admins should avoid opening multiple tickets about a topic if an existing ticket remains open.

# Happy Fox Account

## Creating a Happy Fox Account

- Agency Administrators can create a HappyFox Account by registering using their work email address.
- Once you have registered you will receive a confirmation email, please click the link provided to confirm your account. Once your account has been confirmed you can log in to your account here.

For information on creating a HappyFox account, please refer to the knowledge base article [Creating a Help Desk Account](#).

## Welcome to our Support Center

### Request New Account

Name

Email

Already have an account? [Login](#)

### Login

Login to know the status of the ticket

Username or Email

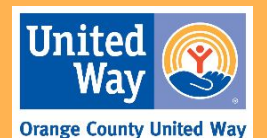
Password

Remember me

[Forgot password?](#)

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# Happy Fox Account

## Creating a Happy Fox Ticket

To create a ticket you will need to fill out the following information:

- **Category:** What issue are you experiencing such as Users and Training or HMIS Functionality Issues.
- **Subject:** The topic of which your request is about.
- **Message:** Enter your question or issue here.
- **Attach a file (optional):** It is helpful to know what users are seeing on their screen, so the HMIS team could attempt to recreate the issue on their end. Please do not include client identifying information.
- **Full Name:** Your name
- **Email:** Your agency work email
- **Phone:** The best number to reach you
- **Agency:** The name of your agency

TICKET DETAILS

Category \*

Subject \*

Message \*  

**B** **I** **U** Font Family Font Sizes **A** **A**

Add CC Attach a file

CONTACT DETAILS

Full name \*

Email \*

Phone

Agency (if you are not affiliated with an agency, do not select a response)

Create Ticket Cancel

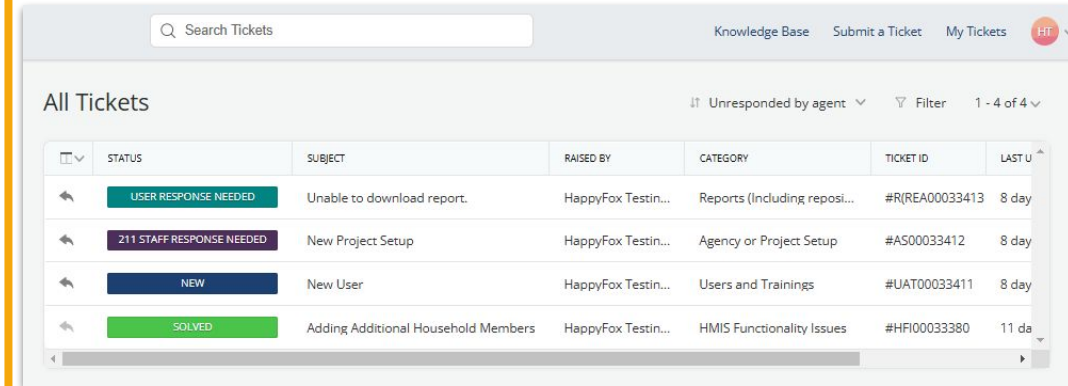
# Happy Fox Account

## Searching for tickets in Happy Fox

Once you have created a ticket, you can see them all under the My Tickets tab.

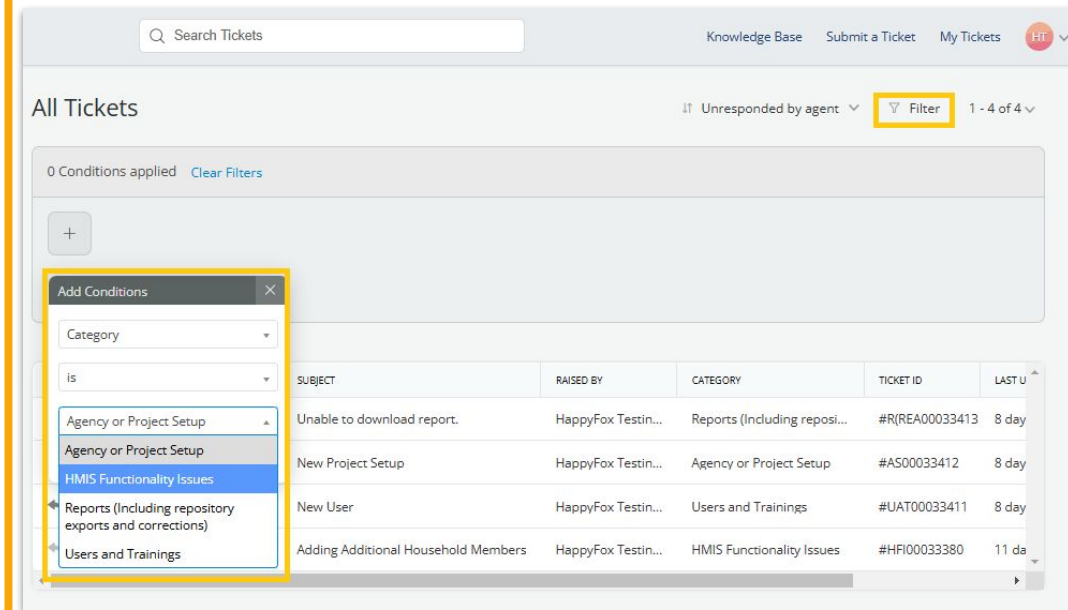
**PLEASE NOTE:** Old tickets will not be migrated to your new HappyFox account. You will only see tickets on this page that you have submitted after you have created your account or after they have been assigned to you.

To search for an existing ticket you can search by the ticket number, and keywords of the subject/category.



The screenshot shows the 'All Tickets' page in the HappyFox interface. At the top, there is a search bar labeled 'Search Tickets' and navigation links for 'Knowledge Base', 'Submit a Ticket', and 'My Tickets'. Below the search bar, the page title 'All Tickets' is displayed along with filters for 'Unresponded by agent' and 'Filter', and a page indicator '1 - 4 of 4'. A table of tickets is shown with columns for 'STATUS', 'SUBJECT', 'RAISED BY', 'CATEGORY', 'TICKET ID', and 'LAST U'. The table contains four rows of tickets with different status indicators: 'USER RESPONSE NEEDED', '211 STAFF RESPONSE NEEDED', 'NEW', and 'SOLVED'.

STATUS	SUBJECT	RAISED BY	CATEGORY	TICKET ID	LAST U
USER RESPONSE NEEDED	Unable to download report.	HappyFox Testin...	Reports (Including reposi...	#R(REA00033413	8 day
211 STAFF RESPONSE NEEDED	New Project Setup	HappyFox Testin...	Agency or Project Setup	#AS00033412	8 day
NEW	New User	HappyFox Testin...	Users and Trainings	#UAT00033411	8 day
SOLVED	Adding Additional Household Members	HappyFox Testin...	HMIS Functionality Issues	#HFI00033380	11 da



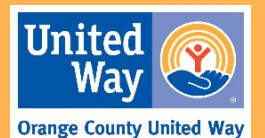
The screenshot shows the 'All Tickets' page in the HappyFox interface, similar to the first screenshot. However, the 'Filter' button is highlighted with a yellow box, and a dropdown menu is open. The dropdown menu shows '0 Conditions applied' and 'Clear Filters'. Below this, there is a '+ Add Conditions' dialog box. The dialog box has a 'Category' dropdown menu with a list of categories: 'Agency or Project Setup', 'Agency or Project Setup', 'HMIS Functionality Issues', 'Reports (Including repository exports and corrections)', and 'Users and Trainings'. The 'Reports (Including repository exports and corrections)' category is selected. The table of tickets is visible in the background, showing the same four rows as in the first screenshot.

SUBJECT	RAISED BY	CATEGORY	TICKET ID	LAST U
Unable to download report.	HappyFox Testin...	Reports (Including reposi...	#R(REA00033413	8 day
New Project Setup	HappyFox Testin...	Agency or Project Setup	#AS00033412	8 day
New User	HappyFox Testin...	Users and Trainings	#UAT00033411	8 day
Adding Additional Household Members	HappyFox Testin...	HMIS Functionality Issues	#HFI00033380	11 da

# Happy Fox Account DEMO

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# Client Record Request

Clients in OC HMIS have the right to review a copy of their data as entered in HMIS. The client may request from any agency participating in OC HMIS that they have been served by currently or in the past.

Clients may inspect and obtain a copy of their data as entered in HMIS.

- Client's Profile Screen
- Release of Information
- Enrollment History
- List of Uploaded Documents

The Agency Administrator are advised to review this report with the client in a secure location due to client identifying information being provided.

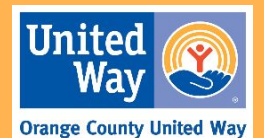
For more information on this process, please review the [Client Record Request](#) knowledge base article



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### Client Profile

First Name	Black
Middle Name	
Last Name	Widow
Suffix	∅
Name Data Quality	Full name reported
Date of Birth Date	1988-09-05
DoB Data Quality	Full DOB Reported
SSN	000-00-0000
SSN Data Quality	Client doesn't know
Ethnicity	Hispanic/Latin(a)(o)(x)
Gender	Female
Race	American Indian, Alaska Native, or Indigenous
Veteran Status	Yes
Branch of Military	Army
Discharge Status	Honorable
Year Entered Military Service	2010
Year Separated from Military Service	2013
Theatre - Afghanistan OEF	Yes
Theatre - Iraq OIF	Yes
Theatre - Iraq OND	No
Theatre - Korean War	No
Theatre - Other	No
Theatre - Persian Gulf ODS	No
Theatre - Vietnam War	No
Theatre - World War II	No

### Release of Information

Agency Name	Orange County United Way
Documentation	Electronic Signature
Start Date	2018-05-17
End Date	2025-05-17
Permission	Yes

### Enrollment History

Agency Name	Name	Project Start Date	Project Exit Date
Erin's Agency	Erin's Transitional Housing	2021-10-20	∅
OC Training Agency	Non-Federally Funded Homeless Prevention Training Project	2021-05-26	∅
County of Orange	Individual Coordinated Entry System	2021-04-14	∅
Family Solutions Collaborative	Family Coordinated Entry	2021-03-26	∅
Orange County United Way	WelcomeHomeOC	2019-10-01	∅
System	Family Shelter	2019-08-08	2019-09-06
Erin's Agency	CFCOC ES Test	2018-06-15	∅
Mercy House	Regina House Emergency	2018-06-15	∅
Erin's Agency	ESG Street Outreach	2018-05-01	∅

### Client Documentation

Agency Uploaded	Client File Category	Client File Name	Client File Other Name	Last Updated Date
Orange County United Way	WelcomeHomeOC	Rental Application	Rental Application	2020-02-12
Orange County United Way	WelcomeHomeOC	Moving Cost Reimbursement	Moving Cost Reimbursement	2020-02-12

# Client Record Policy Survey

The HMIS Helpdesk will be sending out a Client Record Policy Survey.

We welcome agencies to share information about any internal policies for handling client HMIS record requests and encourage feedback about the existing OC CoC HMIS record request process.

For more information about the OC CoC record request process, go to [our website](#) and navigate to Helpful Links > '[HMIS Client Record Requests](#).'



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



# 2025 HIC and Sheltered PIT

## Who should participate?

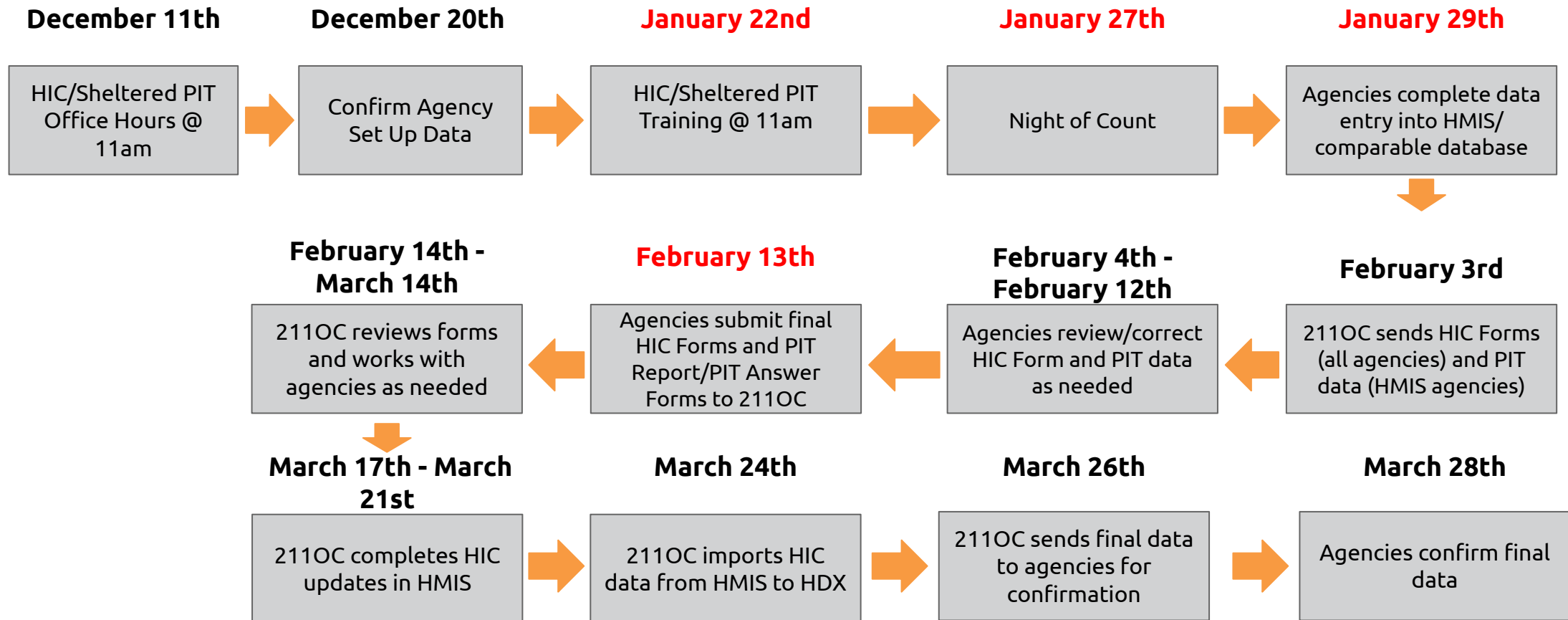
Agencies with any of the following project types, whether or not the projects are in HMIS:

- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing
- Permanent Supportive Housing
- Other Permanent Housing

## What can I do now?

- Complete data entry and data clean-up in HMIS
- Set-up new agencies and projects as needed
- Close projects that are no longer active

# 2025 HIC and Sheltered PIT Timeline



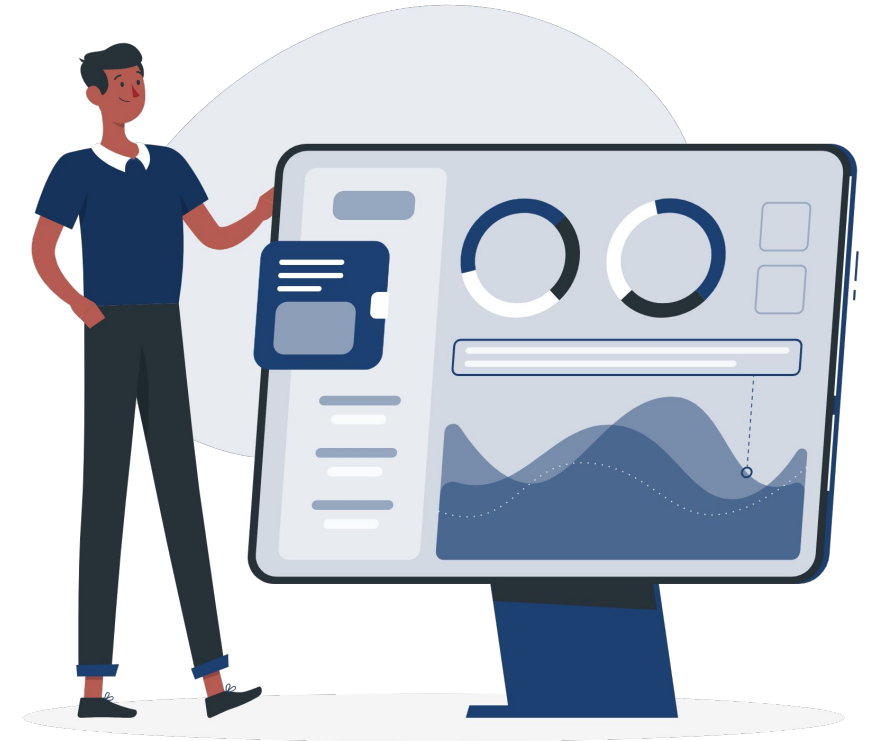
# Project Performance Reports

The Project Performance Report (PPR) for Emergency Shelter will be published on the OC HMIS website in the upcoming weeks. Current and past PPRs can be found at on [our website](#) by navigating to:

[Reports](#) > [Project Performance Reports](#)

Corrections for the Street Outreach PPR draft data will be uploaded into DropBox in the upcoming weeks

The [Project Performance Overview](#) is a helpful document which provides important information regarding the PPRs including the thresholds for each goal and our publishing schedule.



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# Data and Performance Management Meeting

## Agenda:

Quarterly Project Performance Review and Discussion:

- PSH-OPH, Rapid Re-Housing ,and Transitional Housing

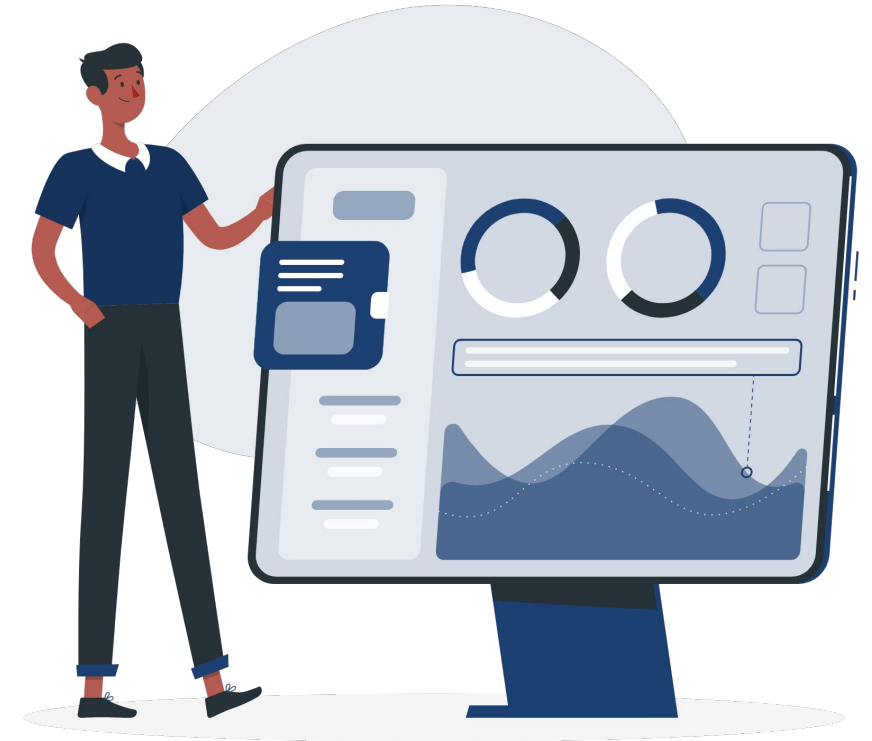
**Wednesday, February 12th @ 10am - 11am**

Click [here](#) to Join!

Meeting ID: 857 7837 0017

Passcode: 463529

Review the [OC HMIS Calendar](#) to find monthly HMIS meeting details including Meeting ID and Passcode.



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# DropBox Clean Up

- Quarterly DropBox Clean Up Schedule:
  - January 2025
  - April 2025
  - July 2025
  - October 2025
- Please review your Agency's DropBox folder and download any files you will need for your records by Friday, January 17th.
- The HMIS Helpdesk will be removing all DropBox files on Tuesday, January 21st.
- Thank you for your cooperation!



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

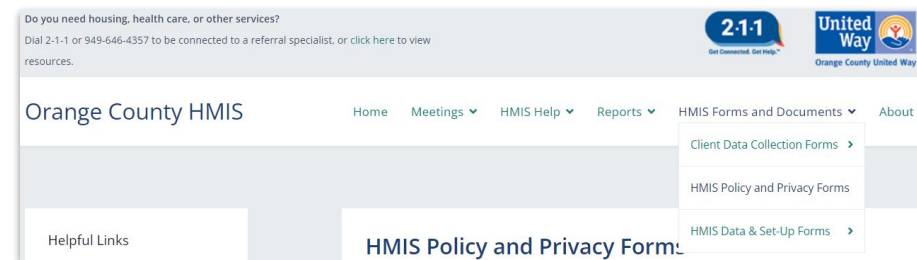
# Client Consent Form Update

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/>



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# Upcoming Trainings

- Introduction to Looker Training  
Monday, Jan 13th, 2pm - 3:30pm
- Deeper Dive into Looker Training  
Thursday, Jan 16th, 10am - 11:30am
- HIC and Sheltered PIT Training  
Wednesday, Jan 22nd, 11 am - 12pm



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# Holidays Observed

The HMIS Helpdesk will be closed on **Monday, January 20th** in observance of **Martin Luther King Jr. Day**.

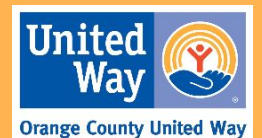
We will be back in office the following business day to assist you.



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

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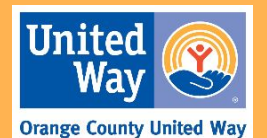


# Q&A

**Reminder: Please enter your agency name in the chat box for attendance**

Thank you  
Have a great day!

Next User Meeting: Feb 5th



**United  
Way**



**Orange County United Way**