

## OC HMIS User Meeting Webinar Minutes 01/08/25

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### Agenda Items

#### ***HMIS Participating Agencies Schedule***

We will be presenting the HMIS Participating Agencies Schedule monthly to highlight upcoming reports and activities in HMIS. For January 2025, we will have the night of the HIC/PIT and will begin working with agencies regarding their counts.

The schedule can be found on our OC HMIS website under the HMIS Forms and Documents tab >> HMIS Policy and Privacy Forms >> [HMIS Participating Agencies Schedule](#)

## ***HMIS User Fee***

The HMIS User Fee can be found in HMIS Policies and Procedures document. The HMIS participation fee structure is available on this link, [Orange County HMIS Policies and Procedures](#)

- 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

## ***New Staff Onboarding***

Step 1: **HMIS Training Courses** - [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 Knowledge Base Article](#) 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.

Step 3: **Skills Test** - Users 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.

## ***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

## ***Inactive Users***

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

Agency Administrators may run the *Agency Active Users* report to review a list of active users as needed. This report can be found by navigating to: 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.

## ***Ticket Submission Categories***

When submitting tickets to the HMIS Helpdesk, agency administrators 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 administrators 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 administrators should avoid opening multiple tickets about a topic if an existing ticket remains open.

## ***HappyFox 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](#).

## **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

## **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.

## ***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 Administrators 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

## ***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 and select '[HMIS Client Record Requests.](#)'

## ***HIC and Sheltered PIT***

This year's HIC and Sheltered PIT date is January 27th. The following project types regardless of their HMIS participating status are required to participate in the HIC and Sheltered PIT reporting: Emergency Shelter, Transitional Housing, Rapid Re-Housing, Permanent Supportive Housing and Other Permanent Housing.

Agencies can prepare by completing the following action items:

- Review and process data correction in HMIS or agency's comparable database
- Set-up new agencies and projects in HMIS
- Close projects that are no longer active

Important Dates:

- January 22nd - [HIC and Sheltered PIT Training at 11am](#)
- January 27th - Night of Count
- January 29th - Complete all data entry and clean up in HMIS/comparable database
- February 13th - Agency submit final HIC Forms, HIC Answer Forms, PIT Report, PIT Answer Forms to HMIS
- March 26th - Agency confirms HDX data compared to final HIC/PIT forms

## ***Project Performance Report***

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.

## ***Data and Performance Meeting***

The date of the next Data Performance Management Meeting scheduled for Wednesday, February 12th at 10AM. The HMIS team will be reviewing and hosting a discussion around the Quarterly Project Performance Reports for PSH-OH, Rapid Re-Housing, and Transitional Housing projects.

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

To review past Data and Performance Meeting materials including the record meeting and slide deck with live links, [go to our website](#) > Meetings > [Data and Performance Management Materials](#).

## ***DropBox Clean Up***

The 2025 DropBox clean-up schedule is set for January and July of 2025. Staff with access to their Agency Dropbox need to review their agency folder and download any desired records by Friday, January 17th.

The HMIS Helpdesk will be removing all Dropbox files on Tuesday, January 21st. Thank you in advance for your cooperation!

## ***Updated HMIS Consent Form***

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](#) > hover over 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 on [our website](#) > About > [Agencies with Access to HMIS](#).

## ***Trainings***

The OC HMIS Team will be hosting the following trainings for the month of January:

- [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, 11am - 12pm

Registration is required. Click on the links embedded in the trainings listed above to register.

## ***Holiday***

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 days to assist you.

## ***Q&A***

### HMIS User Fees

- Q: How much are the HMIS user fees?
  - A: A breakdown of the annual HMIS user fees is available in the [OC HMIS Policies and Procedures Manual](#). Agencies who receive state or federal funding will be charged HMIS user fees, as well as all agencies who participate in CES as access points.

### New Staff Onboarding

- Q: What is the turnaround time for having new user accounts created?
  - A: The HMIS Helpdesk team usually processes account creation requests within 3 business days. CES approvals are dependent on the CES Leads approval timeline.
- Q: Why is there a 24 hour turnaround time for new users to login to HMIS?
  - A: Our vendor, Bitfocus, sets a 24 hour timeframe for users to login to HMIS after they have had their accounts reactivated. This timeframe begins the moment the HMIS Helpdesk reactivates a user's account.
- Q: Where can Agency Admins submit suggestions to improve the training process?
  - A: Agency Admins can submit feedback or other suggestions to the HMIS Helpdesk by utilizing our ticketing system.

#### Troubleshooting HMIS Login

- Q: What is the wait time for users to login to HMIS after they've been locked out?
  - A: Users are given 4 password attempts to login to HMIS. If a user has used all of their available password attempts, and are then locked out, an Agency Admin must submit a ticket to the HMIS Helpdesk to have the user's account unlocked. Only the HMIS Helpdesk team can manually unlock user accounts.

#### Ticket Submission Categories

- Q: What category should Agency Admins use to link CES enrollments to referrals?
  - A: Agency Admins should utilize the *HMIS Functionality Issues* ticket category.

#### HappyFox Account

- Q: How can Agency Admins reply/reopen solved tickets?
  - A: Within the ticket thread, Agency Admins can click on the 'reply' button at the bottom of the page and send a response to reopen the ticket.

#### Client Record Request

- Q: How can Agency Admins obtain the client record request dashboard?
  - A: After receiving the request from a client, Agency Admins must submit a ticket to the HMIS Helpdesk to receive the client record request dashboard; this will be uploaded into your agency's Dropbox folder for review.

#### HIC and Sheltered PIT

- Q: Will the HIC/PIT timeline be posted on the OC HMIS website?
  - A: The slides containing HIC/PIT information will be available within the meeting minutes. The HIC/PIT knowledge base articles will be updated as well for the 2025 HIC/PIT cycle.

### ***Future Meeting Information***

#### ***February 2025 HMIS User Meeting Webinar***

- Date: Wednesday, February 5th, 2025
- 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.