January 2026
OC HMIS User Meeting

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Agenda

1. HMIS Participating Agencies Schedule
2. Case Note Policy Reminder
3. HMIS User Fee
4. User Training and Access Roles
5. HMIS Data Quality Report
6. Project Performance Report - Goal 1 Overview
7. Project Performance Report
8. Training and Resources
9. HIC and Sheltered PIT
10. DropBox Clean Up
11. Survey
12. Holiday
13. Q&A
14. Office Hours

Meeting materials and recording will be available on the OC HMIS website

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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.

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HMIS Participating Agencies Schedule

HMIS Participating Agencies Schedule

HMIS Participating Agencies Schedule

- HIC and Sheltered PIT
    - Training Meeting - Jan 22nd at 11 am.
    - Night of the count - Jan 26th

- Project Performance Report (PPR) Corrections
    - Street Outreach 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 12/01/2023 - 11/30/2025
        - Please review the PPR Webinars for additional information about running and review PPR Goals 1 - 10 for your agency's programs

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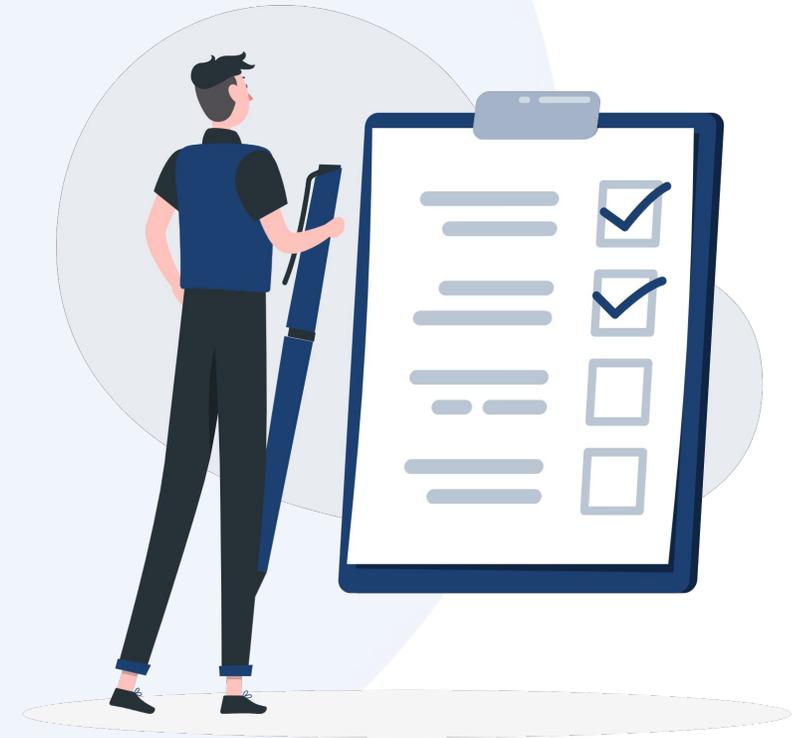
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Case Notes - Policy Reminder

Ensure that all staff at your agency are familiar with your policy around sharing case notes from OC HMIS.

If your agency does not have a policy on sharing case notes, we encourage your agency to develop one.

Please see the OC HMIS Policies & Procedures (p 25, E -Client Record Requests) and the Client Record Request KB for more details.

The HMIS Team is developing a case note report to support agencies to pull this data and will share updates once this report is live.

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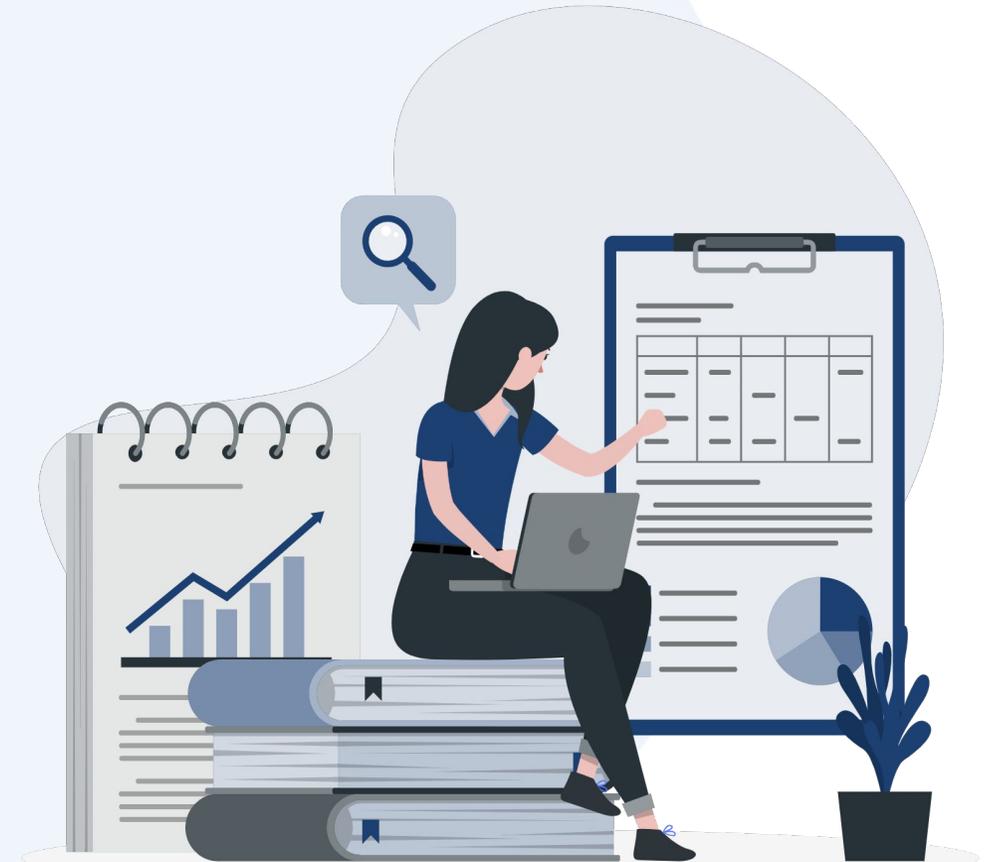
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HMIS User Fees

- Agencies will receive invoices for 2026 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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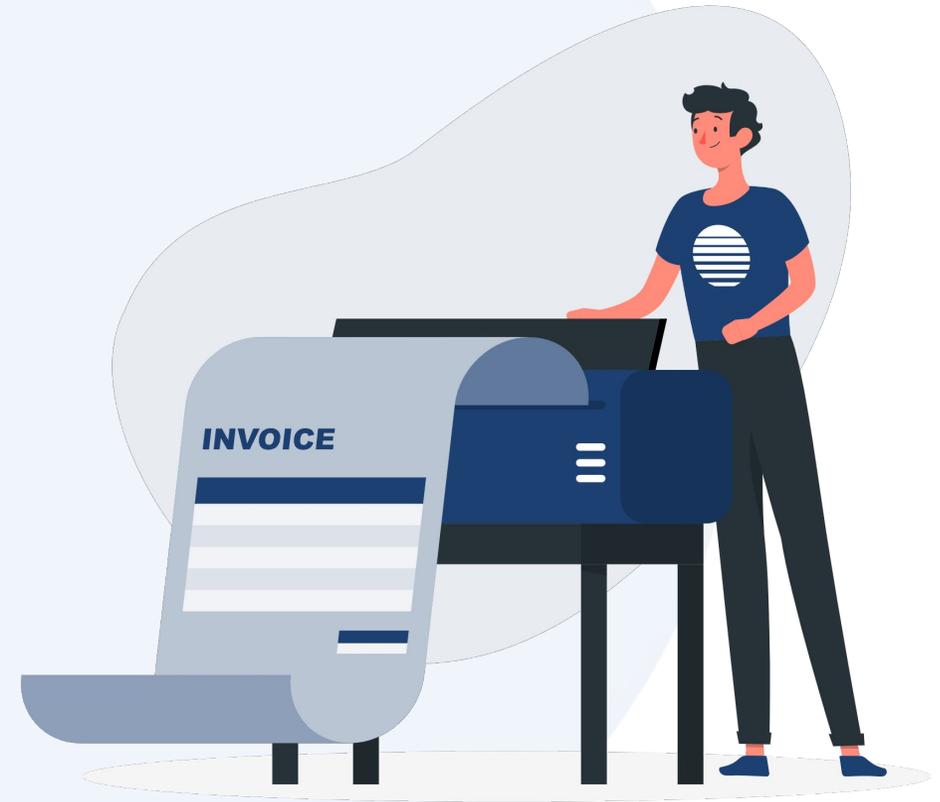
Welcome new HMIS Users

As new HMIS Agency Admins and HMIS Staff are onboarding, our HMIS Team wanted to provide an overview of the required training and access role functionalities.

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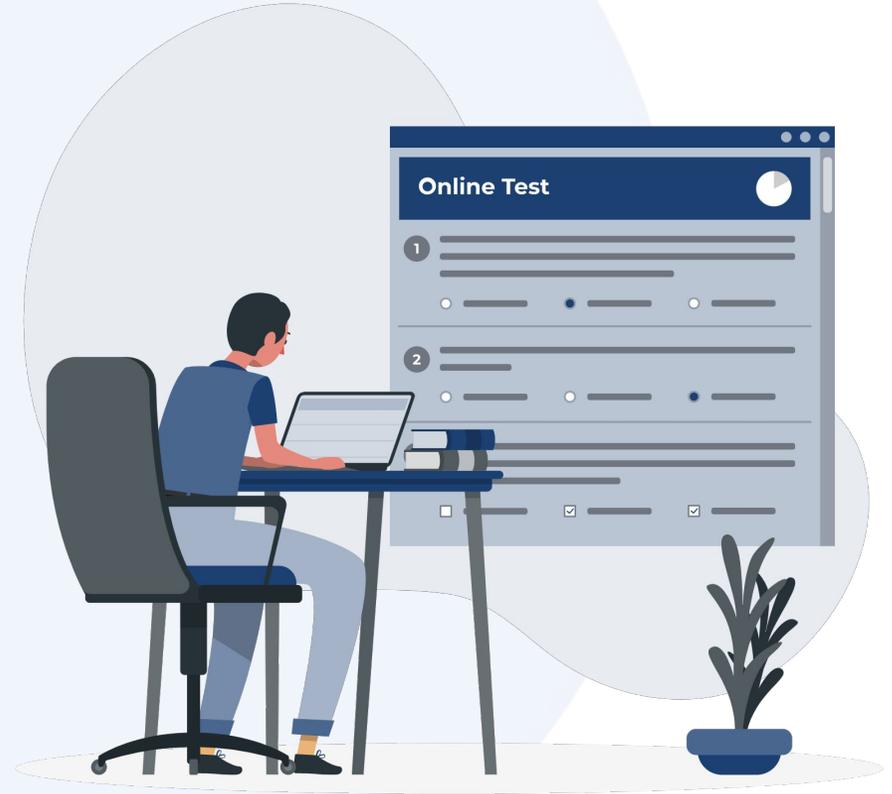
User Training and Access Roles

HMIS Users- Read Only	HMIS Users	Agency Administrators	Coordinated Entry Access
HMIS Part 1	HMIS Part 1 HMIS Part 2 HMIS Part 2 Task List	HMIS Part 1 HMIS Part 2 HMIS Part 2 Task List Agency Administrator Training	HMIS Part 1 HMIS Part 2 HMIS Part 2 Task List HMIS CES Training

Please review the following Knowledge Base Articles to determine the access role the user would need and for next steps.

New Staff Onboarding

HMIS Account Update & Testing Form

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Table of Functionalities - Access Roles

Each access role has the functionalities listed from the previous access role as you move right to left.
For example the HMIS Agency Admin will have access to all the functionality listed for HMIS Agency Staff in additional to specific access role rights for the HMIS Agency Admin account role.

The HMIS System Admin role is reserved for the OC HMIS Helpdesk to support the OC HMIS community.

HMIS Agency Staff	CES Access (Approval Required)	HMIS Agency Admin	HMIS System Admin
Access Rights: History, Services, Programs, Public Alerts and Client Notes, Files, Attendance Services, Contacts, Assessments, Privacy, Manage Consent Refused Records, Client Reports, Report Library	**Create Rights:** Access Point: Create referrals and send to Community Queue Housing Providers: Create Housing Opportunities	**Delete Rights:** Agency - Services, Program, Program Files, Public Alerts and Client Notes, Files, Location, Assessments	**Create Rights:** Referral Linkage, Merage Client Profiles, Program Moves, Support with Referrel Edits
Edit Rights: Client Profile, Any Client Profile Agency: Services, Program Files, Location, Contacts, Assessments	Agency Admin: Delete Files		
Delete Rights: Agency Services			

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HMIS Training - Inactive HMIS User Accounts

HMIS Users are required to keep their account active and to do so please add a monthly reminder to log into OC HMIS.

If a HMIS User does not log into OC HMIS over 60 days, their account will be deactivated. At that stage, the HMIS User will need to retake the HMIS training to regain access to OC HMIS.

The system will send a reminder 2 days before a HMIS User surpasses the 60 day threshold. Please ensure that you take timely action to keep your account active.

Dear User,

Your account has been disabled due to inactivity.

Account de-activation occurs when you do not access your account during the inactivity policy period specified by your System Administrator. You last accessed Orange County Clarity System on 07/11/2022.

Orange County Clarity System Team

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[HUDX-225] HMIS Data Quality Report

Tables within this report are utilized in other HUD HMIS Federal Reports, like the APR, CAPER, and CE APR. These tables include the Report Validation Table, and Data Quality Tables highlighting Personally Identifiable Information, Universal Data Elements, Income and Housing, Chronic Homelessness, and Inactive Records. The report also generates a table based on the selected agencies and programs for the report run.

Data Accuracy

- It refers to the degree to which data entered in HMIS reflects the real information of the clients served and the services provided.

Data Timeliness

- It refers to the degree to which the data is collected in HMIS and available when it is needed. Data Timeliness looks at how much time passes from the moment data is collected from the client until the moment that data is entered in HMIS.

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[HUDX-225] HMIS Data Quality Report

REPORT LIBRARY

Favorite Reports	0 report(s) ⌄
Data Quality Reports	6 report(s) ⌄
Administrator Reports	16 report(s) ⌄
Service Based Reports	13 report(s) ⌄
Program Based Reports	24 report(s) ⌄
Assessment Based Reports	4 report(s) ⌄
Profile Screen Reports	1 report(s) ⌄
Housing	5 report(s) ⌄
HUD Reports	11 report(s) ⌃
[HUDX-111] HUD CSV / XML Pr...	Retired ★ | ⊙ RUN | 🗓 SCHEDULE | MORE INFO ⌄
[HUDX-111] HUD CSV / XML Pr...	★ | ⊙ RUN | 🗓 SCHEDULE | MORE INFO ⌄
[HUDX-123] Housing Inventory (...	★ | ⊙ RUN | 🗓 SCHEDULE | MORE INFO ⌄
[HUDX-224] PATH Annual Repor...	★ | ⊙ RUN | 🗓 SCHEDULE | MORE INFO ⌄
[HUDX-225] HMIS Data Quality ...	★ | ⊙ RUN | 🗓 SCHEDULE | MORE INFO ⌄

HMIS Data Quality Report [FY 2026]

System
CoC Category Filter: Agency CoC
Client ID Selection: Clarity Unique Identifier
Date Range: 09/01/2025 thru 12/01/2025

Q1. Report Validation Table
Program Applicability: All Projects

Category	Count of Clients for DQ	Count of Clients
Total number of persons served	26	26
Number of adults (age 18 or over)	20	20
Number of children (under age 18)	4	4
Number of persons with unknown age	2	2
Number of leavers	0	0
Number of adult leavers	0	0
Number of adult and head of household leavers	0	0
Number of stayers	26	26
Number of adult stayers	20	20
Number of veterans	2	2
Number of chronically homeless persons	0	0
Number of youth under age 25	1	1
Number of parenting youth under age 25 with children	0	0
Number of adult heads of household	10	10
Number of child and unknown-age heads of household	1	1
Heads of households and adult stayers in the project 365 days or more	5	5

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[HUDX-225] HMIS Data Quality Report Demo
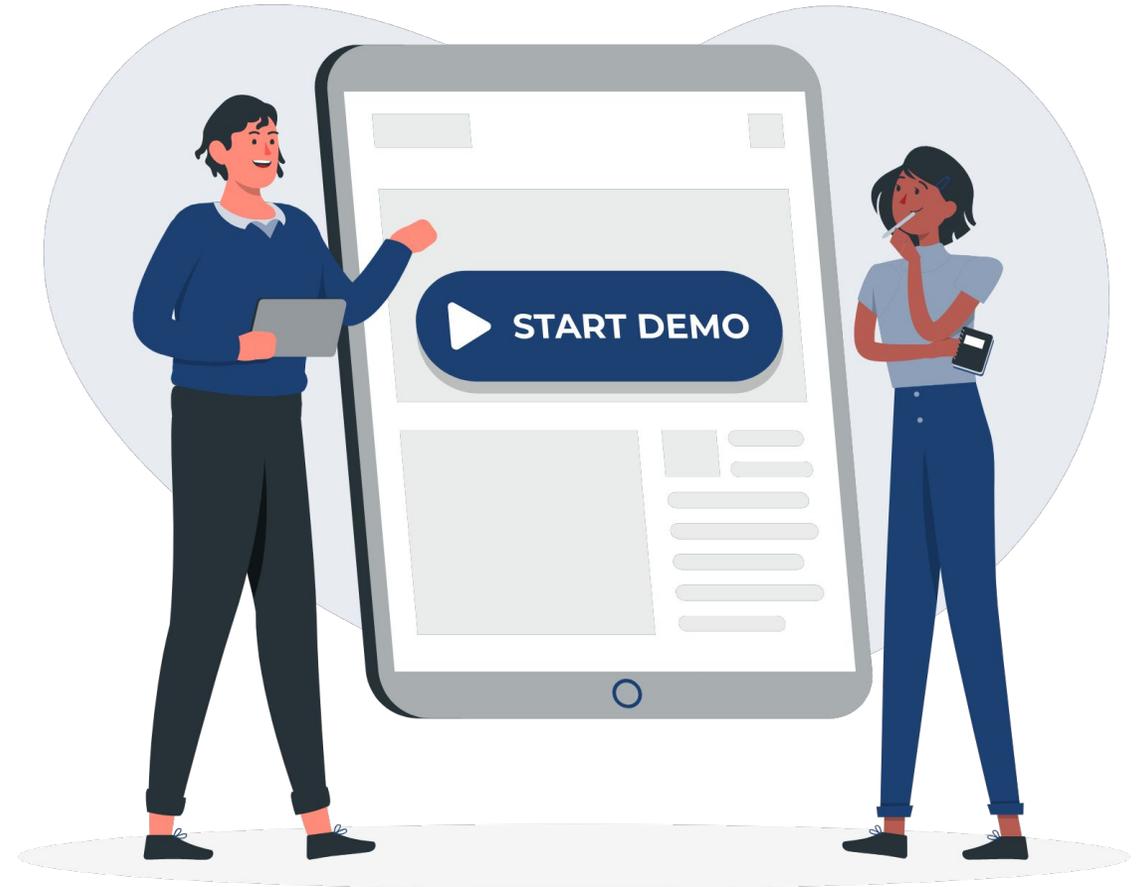
PPR Goal 1 - Overview

Goal 1 is focused on prioritizing clients experiencing literal homelessness. This means that **100% of clients** in projects dedicated to serving clients experiencing homelessness come from **literal homelessness situations** to ensure that the CoC's limited resources are focused on those with the greatest need.

The following project types are applicable to Goal 1:
- Street Outreach
- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing
- Permanent Supportive Housing - Other Permanent Housing (PSH-OPH)

Agencies should strive to achieve a **100% target** for all these Goal 1 project types

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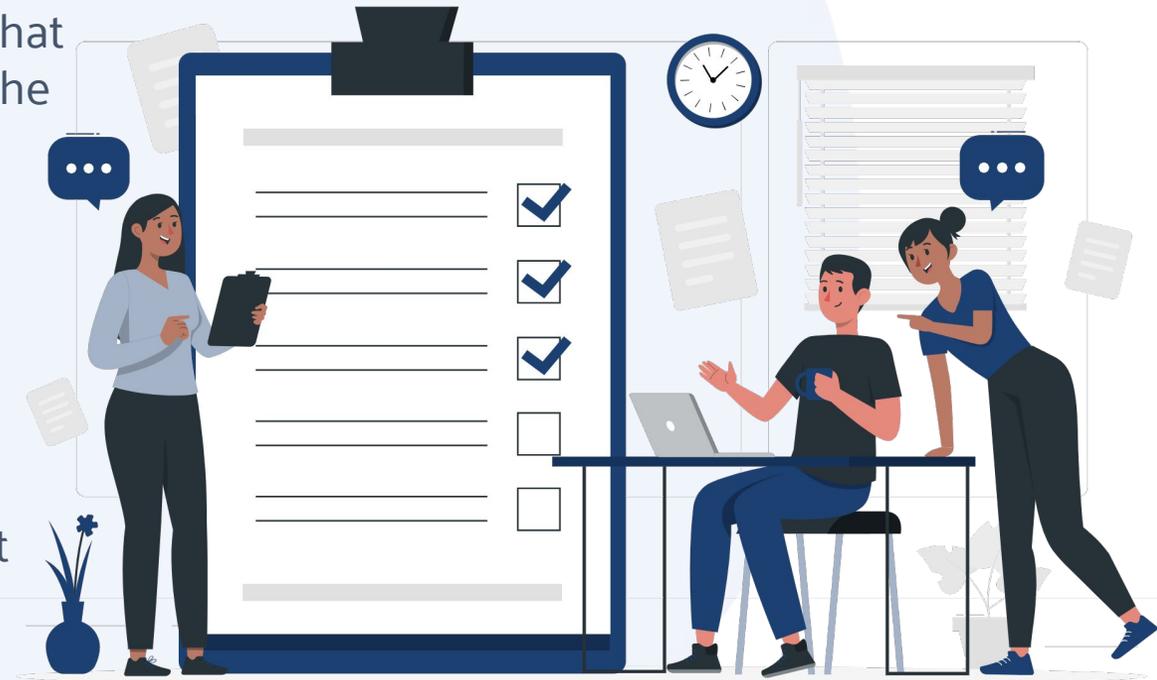
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PPR Goal 1 - Literal Homeless Situations

Goal 1 utilizes UDE 3.917 - *Prior Living Situation* to determine whether clients enter projects from a literal homeless situation. This data is collected on the entry screen from all adults and HoH, and is meant to identify the type of living situation and length of stay immediately prior to project start.

Literal homeless situations are defined as:
- Place not meant for habitation
- Emergency shelter
- Safe Haven
- Transitional housing for homeless persons (including homeless youth)

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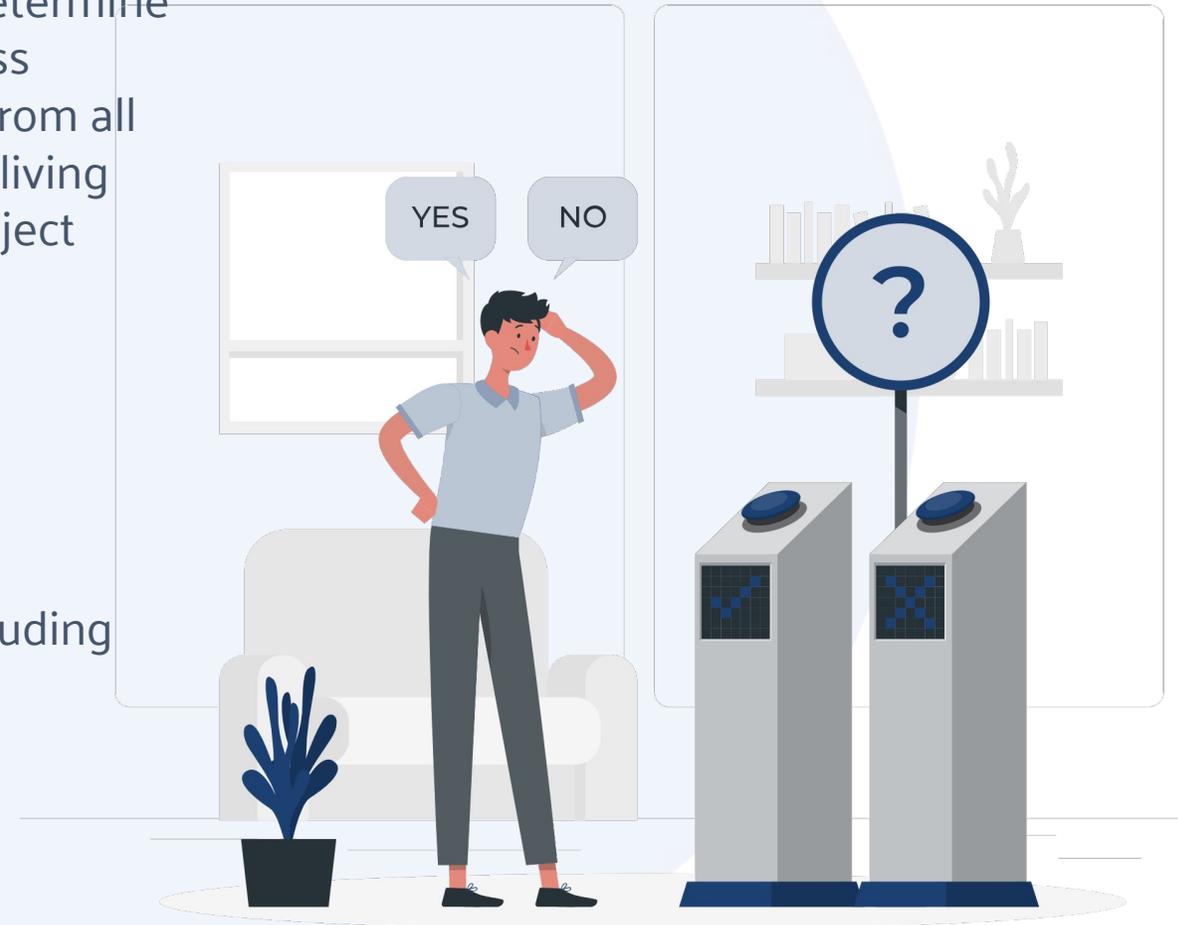
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PPR Goal 1 - "Neutral" Entries

"Neutral" entries are defined as:
- Clients entering from non-homeless situations who are fleeing domestic violence
- Clients that are Chronically Homeless and entering from non-homeless situations
- Clients entering from an institutional setting where their length of stay was less than 90 days, and the client was homeless prior to entering the institution
- Clients entering from a non-homeless situation where their length of stay was less than 7 nights, and the client was homeless prior to entering the non-homeless situation

For PSH-OPH projects, the following subsidy types are considered "neutral" entries if the client transitioned within 14 days:
- Permanent Supportive Housing
- RRH or equivalent subsidy
- Other permanent housing dedicated for formerly homeless persons

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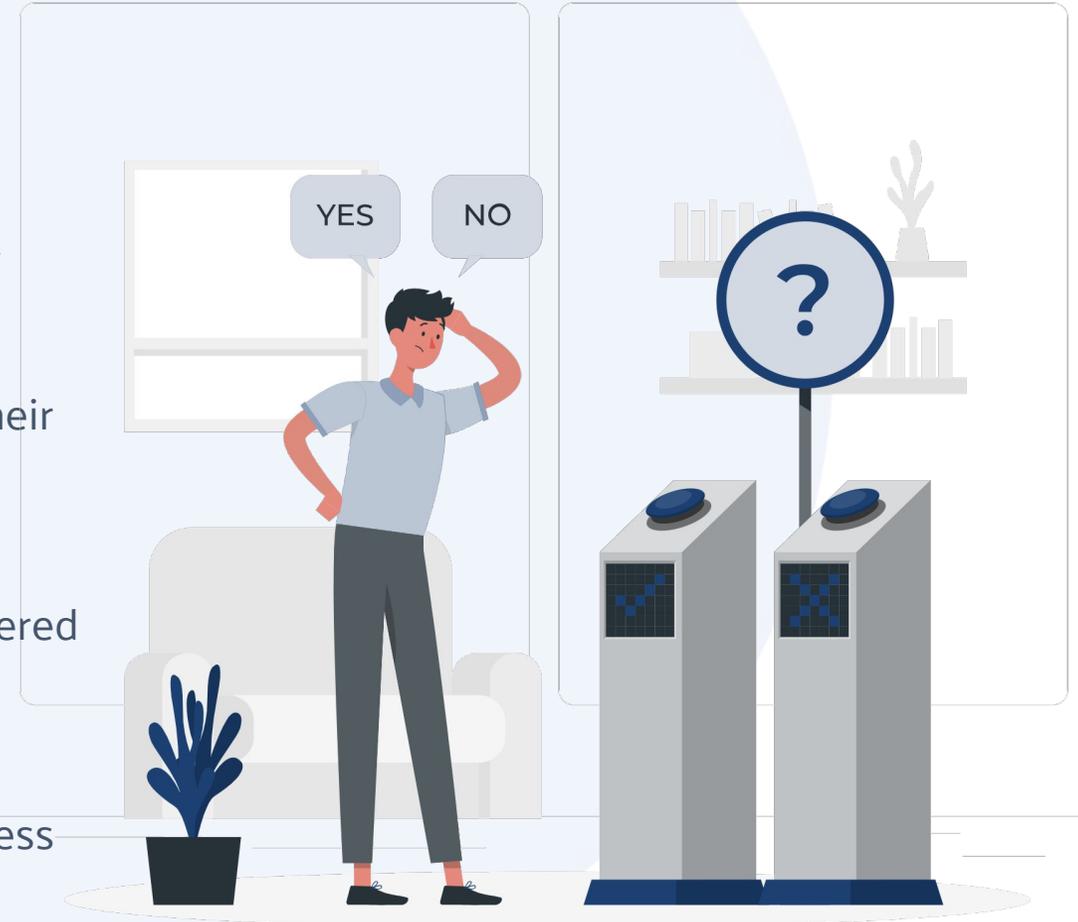
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PPR Goal 1 - Additional Resources

HMIS Users can run dedicated PPR reports to obtain granular information about a specific goals based on project type.

These reports can be found by navigating to:
Reports > Data Analysis > Orange County Clarity System Reports > Project Performance Reports

For additional information on *Prior Living Situation*, agency admins can reference our [Prior Living Situation 3.917A](#) and [Prior Living Situation 3.917B](#) KB articles
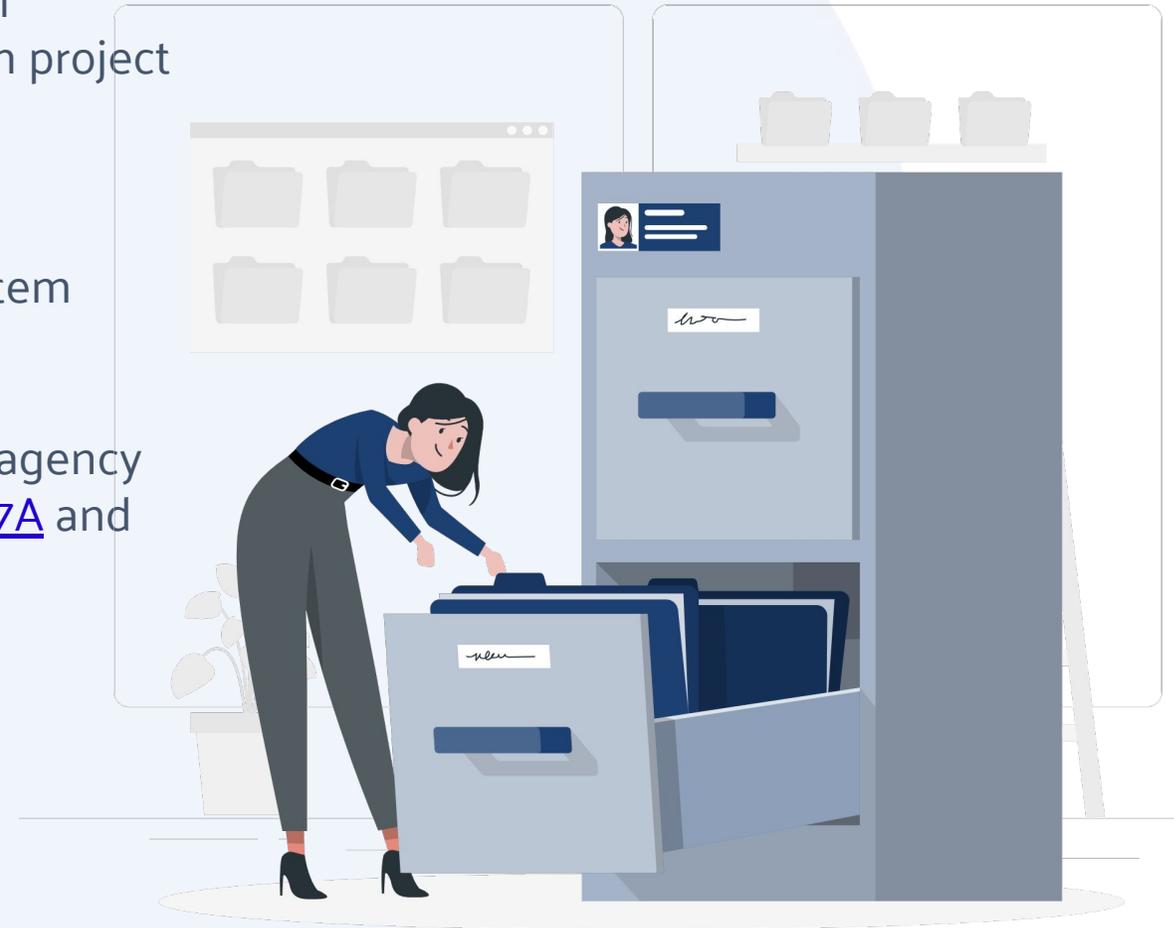
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Project Performance Report: Goal 1 Demo

START DEMO

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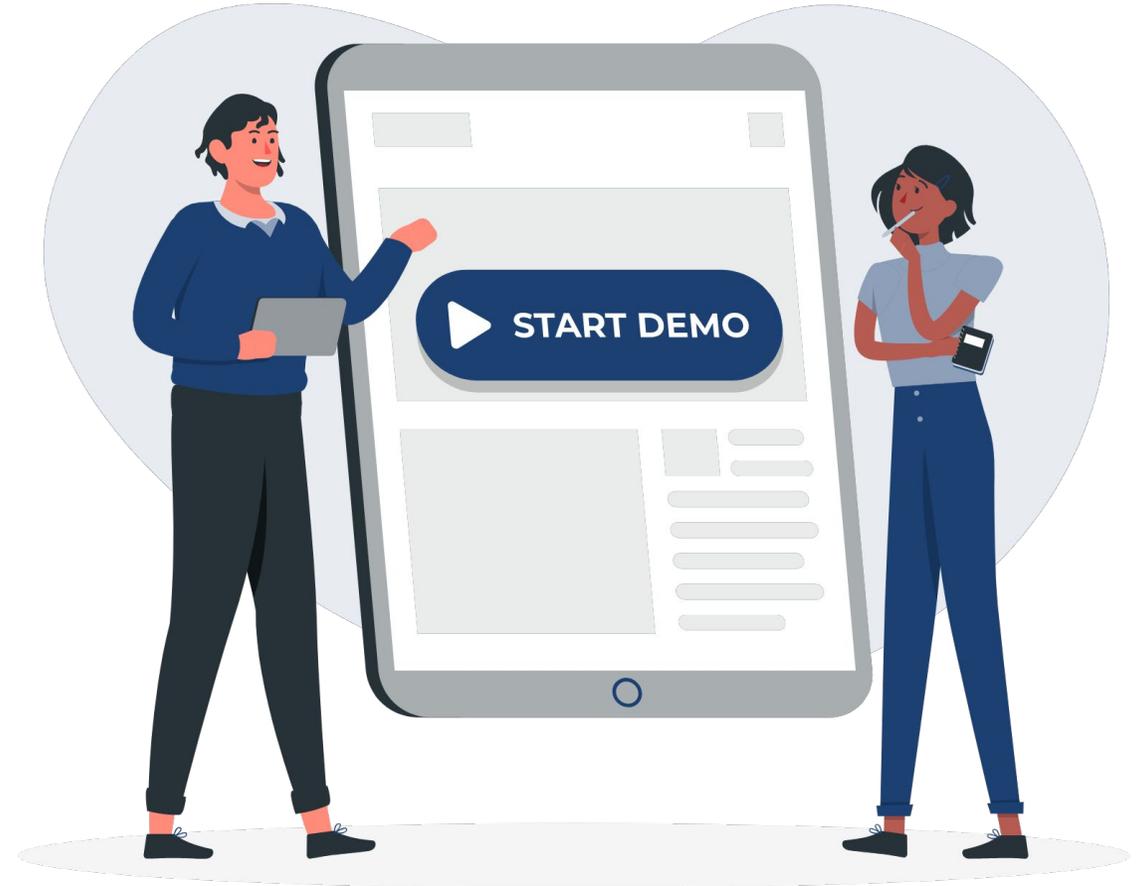
Project Performance Report (PPR)

The Emergency Shelter (ES) PPR will be published 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 Street Outreach (SO) PPR draft data will be uploaded into DropBox this week.

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

HUD Exchange Resources:

The FY2026 HMIS Data Standards are now available on the HUD Exchange!

- 2026 HMIS Data Standards Manual
- FY 2026 Interactive HMIS Data Standards Tool
- HMIS Data Collection Requirements for Transition to FY 2026 HMIS Data Standards

Community Resources:

Helpful Coordinated Entry Resources may be found on the Office of Care Coordination's OC CES Academy website.

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Training and Resources

2026 HIC and Sheltered PIT Training

The OC HMIS Team will be hosting a 2026 HIC and Sheltered PIT Training on:

Thursday, January 22nd, 2026 @ 11AM

Click here to Join!

Meeting ID: 874 7007 5671

Registration is not Required.

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Training and Resources

2026 HIC and Sheltered PIT Office Hours

The OC HMIS Team will be hosting 2026 HIC and Sheltered PIT Office Hours on:

Monday, February 9th, 2026 @ 1PM-2:30PM

Click here to Join!

Meeting ID: 826 9262 9243

Registration is not Required.

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2026 HIC and Sheltered PIT

Who should participate?

Agencies with any of the following project types, whether or not those projects are in HMIS, will participate in HIC/Sheltered PIT:
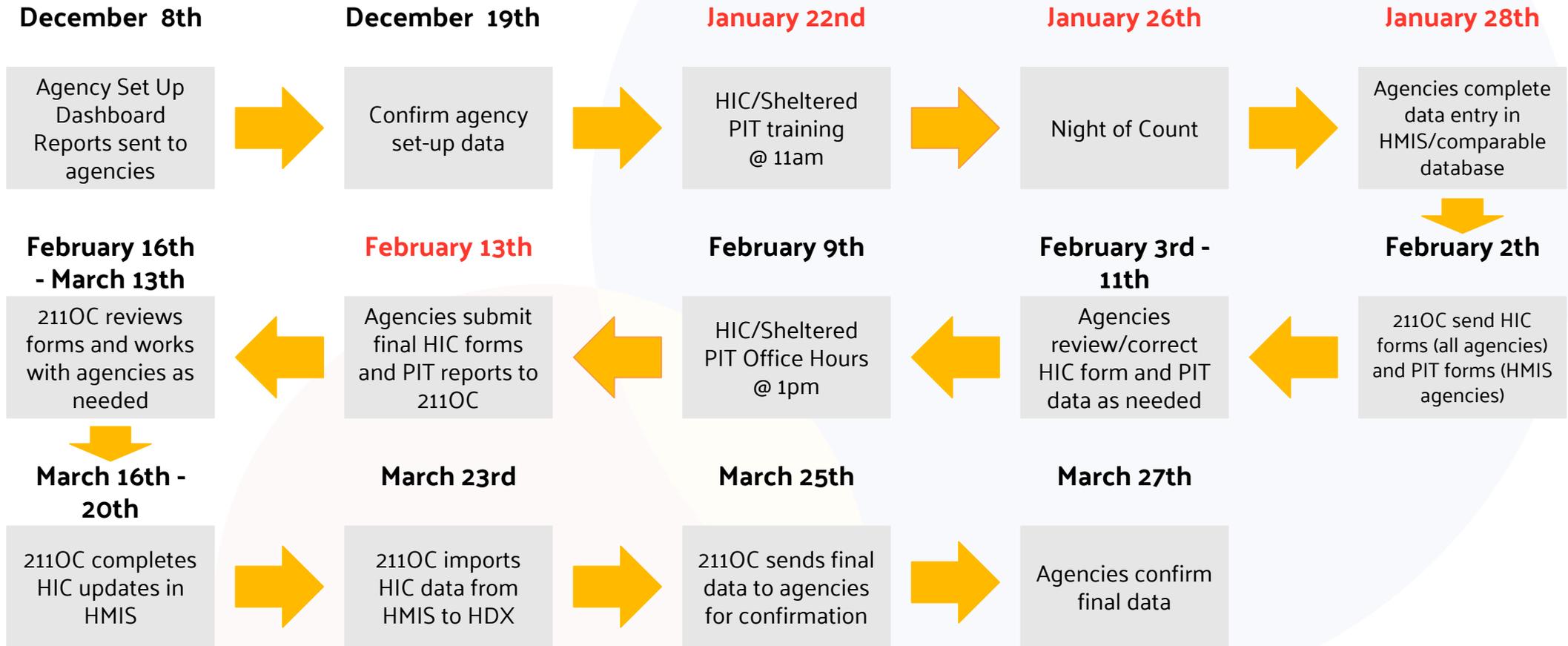
- Emergency Shelter
- Transitional Housing
- Rapid Re-Housing
- Permanent Supportive Housing
- Other Permanent Housing

What can I do now?

Agencies that will participate in HIC/Sheltered PIT should:

- Complete data entry and data clean-up in HMIS
- Set-up new agencies and projects as needed
- Close-out projects as needed

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2026 HIC and Sheltered PIT Timeline

December 8th

Agency Set Up Dashboard Reports sent to agencies

December 19th

Confirm agency set-up data

January 22nd

HIC/Sheltered PIT training @ 11am

January 26th

Night of Count

January 28th

Agencies complete data entry in HMIS/comparable database

February 16th - March 13th

211OC reviews forms and works with agencies as needed

February 13th

Agencies submit final HIC forms and PIT reports to 211OC

February 9th

HIC/Sheltered PIT Office Hours @ 1pm

February 3rd - 11th

Agencies review/correct HIC form and PIT data as needed

February 2th

211OC send HIC forms (all agencies) and PIT forms (HMIS agencies)

March 16th - 20th

211OC completes HIC updates in HMIS

March 23rd

211OC imports HIC data from HMIS to HDX

March 25th

211OC sends final data to agencies for confirmation

March 27th

Agencies confirm final data

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2026 HIC and Sheltered PIT Action Items

- Run the [Program Roster Report](#)
  - Complete data entry and data clean-up in HMIS
  - PSH-OPH review households housing move in date for accuracy

- Run the [Agency Set Up Dashboard](#) to review for accuracy

- [Set-up new projects](#) as needed

- [Close projects](#) that are no longer active

- Update [Funding Source](#) and [Bed Inventory](#) as needed

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DropBox Clean Up

- DropBox Clean Up Schedule:
  - January 2026
  - June 2026

- Please review your Agency's DropBox folder and download any files you will need for your records by Friday, January 16th.

- The HMIS Helpdesk will be removing all DropBox files on Wednesday, January 21st.

- Thank you for your cooperation!

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Holidays

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

Monday, January 19th in observance of **Martin Luther King Jr. Day**.

We will be back in office **Tuesday, January 20th**, to assist you.

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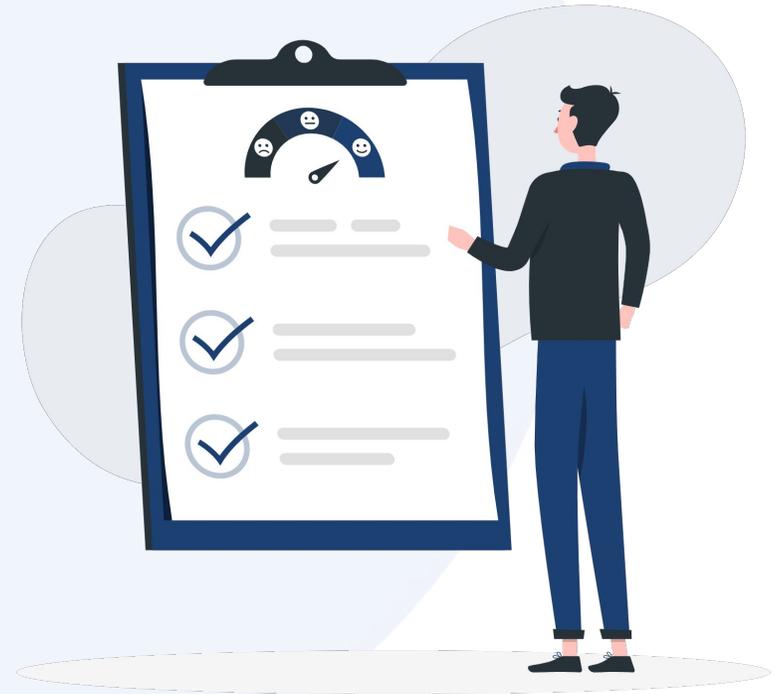Orange County
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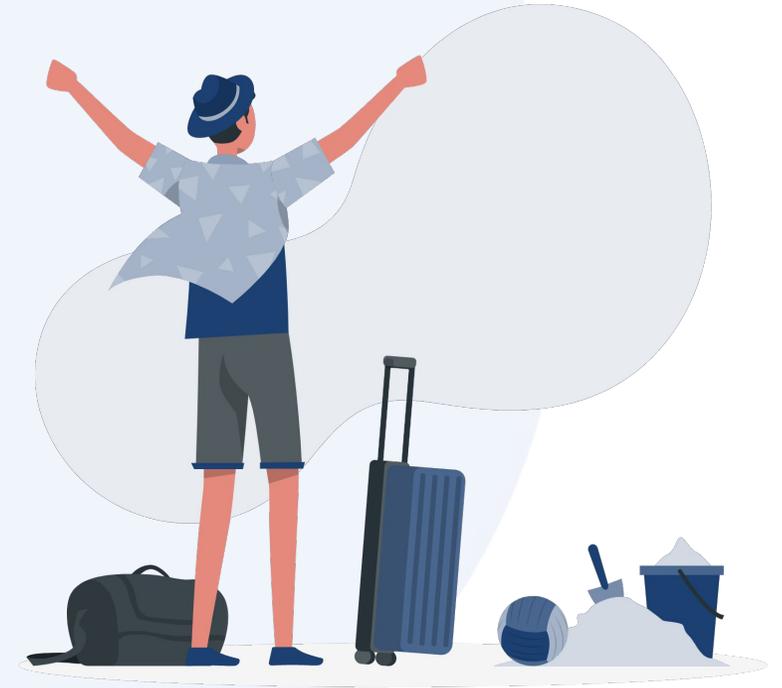
HMIS User Meeting Survey

Our HMIS Team invites users to complete the HMIS User Meeting Survey. The feedback from the survey is used for 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/TpHRuhTsm7Gws3VUA

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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

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Thank you
Have a great day!

Next User Meeting: February 4th