

OC HMIS User Meeting Webinar Minutes
01/07/26

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Agenda Items

HMIS Participating Agencies Schedule

HIC and Sheltered PIT

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

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

[HMIS Participating Agencies Schedule](#)

Case Notes - Policy Reminder

Please 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. You may reference the [OC HMIS Policies & Procedures](#) (p 25, E -Client Record Requests) and the [Client Record Request KB](#) for more details. Stay tuned for a Case Notes Report currently being developed by our OC HMIS Team. This report will be used to support agencies who pull this data. We'll send out an update once the report is live.

HMIS User Fee

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. For specifics around HMIS User Fees please see page 16 of the [OC HMIS Policy and Procedures](#) document.

User Training and Access Roles

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. Please review the following training requirements for each level of access:

HMIS Users - Read-Only Access (view data only)

- [HMIS Part 1](#) - Covers history of HMIS, privacy and security, basic HUD definitions, and HMIS best practices.

HMIS Users (view and enter data)

- [HMIS Part 1](#) - Covers history of HMIS, privacy and security, basic HUD definitions, and HMIS best practices.
- [HMIS Part 2](#) - Covers HMIS functionality.
- [HMIS Part 2 Task List](#)
- Agency Administrators
- [Agency Administrator](#) - Covers the responsibilities and additional HMIS functionality provided to Agency Administrators, as well as tips on how to maintain data quality.

Agencies Participating in Coordinated Entry (CES) or Bed Reservation

- [HMIS CES Training](#) - Covers CES best practices and functionality. Because the Bed Reservation system uses the community queue functionality, this training is required for users whose agencies participate in

the Bed Reservation system even if they do not participate in CES.

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.

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.

Project Performance Report - 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

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)

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

Additional Resources

HMIS Users can run dedicated PPR reports to obtain granular information about 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

Project Performance Report

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.

Training and Resources

FY 2026 HUD Exchange Resources are now available on 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](#).

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 - Registration is not required.

Click [here](#) to Join!

Meeting ID: 874 7007 5671

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 - Registration is not required.

Click [here](#) to Join!

Meeting ID: 826 9262 9243

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 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

2026 HIC and Sheltered PIT Timeline

Dates:

- December 8th - Agency set-up dashboard reports sent to agencies
- December 19th - Confirm agency set-up data
- **January 22nd** - HIC/Sheltered PIT training at 11:00AM
- **January 26th** - Night of Count
- **January 28th** - Agencies complete data entry in HMIS/comparable database
- February 2nd -211OC sends HIC forms (all agencies) and PIT forms (HMIS agencies)
- February 3rd through 11th - Agencies review/correct HIC forms and PIT data as needed
- February 9th - HIC/Sheltered PIT office hours at 1:00PM
- **February 13th** - Agencies submit final HIC forms and PIT reports to 211OC
- February 16th through March 13th - 211OC reviews forms and works with agencies as needed
- March 16th through 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

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

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.

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!

Holiday

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.

Q&A

HMIS User Fees

- Q: Is user fee a new addition? Can you please share the article you just mentioned about this topic?
 - A: This is not a new addition/policy. Participating Agencies that receive state and/or federal funding that require HMIS participation will be charged for the number of licenses the agency has active at the end of the calendar year. Please review the [HMIS P&P](#) for additional information.

HIC/PIT Timeline

- Q: Is there a calendar or somewhere we may view the HIC/PIT timeline?
 - A: Please see the above "2026 HIC and Sheltered PIT Timeline" for details. Meeting materials will also be uploaded to our website which include the HIC/PIT timeline. Our meeting recap from our Newsletter will include this information as well.

Future Meeting Information

February 2026 HMIS User Meeting Webinar

- Date: Wednesday, February 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.