

February 2026 OC HMIS User Meeting

211

Get Connected. Get Help.™



Orange County
UNITED WAY

Agenda

1. HMIS Participating Agencies Schedule
2. HMIS Data Entry & Performance Impact
3. Privacy and Personal Identifying Information Guidance
4. Client Consent and CES Enrollment
5. Client Consent Form Update
6. HappyFox Account
7. System Performance Measure
8. HIC and Sheltered PIT Reminder
9. 2026 HIC and Sheltered PIT Data Dashboard
10. Project Performance Report - Goal 2, 3, and 4 Overview
11. Project Performance Report
12. Reactivation Training
13. Training and Resources
14. Survey
15. Holiday
16. Q&A
17. Office Hours



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



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.

HMIS Participating Agencies Schedule

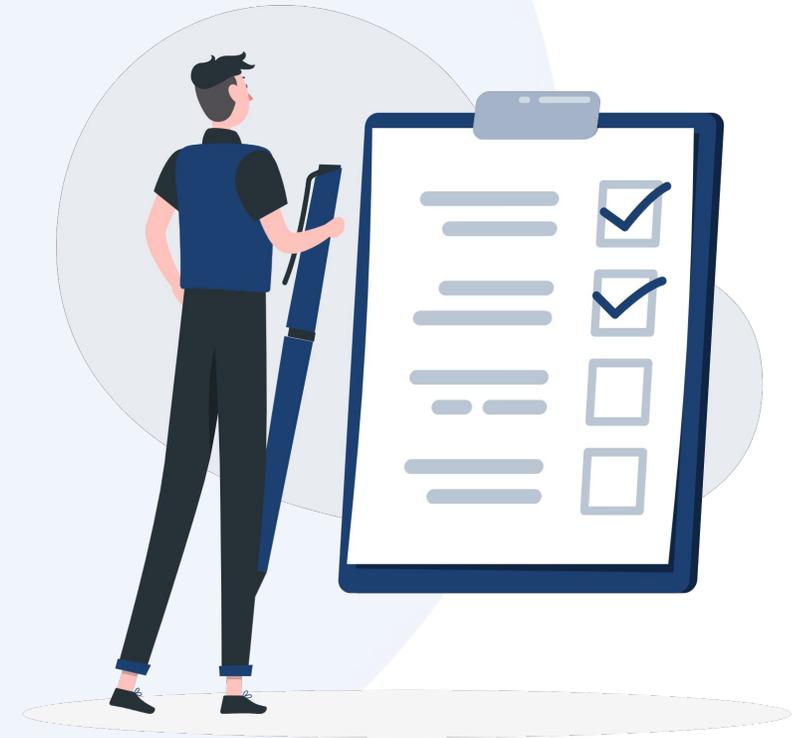
HMIS Participating Agencies Schedule																	
 																	
Requirement Type	Requirement Name	Estimated Start Date	Estimated Agency Due Date	Estimated HUD Due Date	Estimated Publication Date	January	February	March	April	May	June	July	August	September	October	November	December
HUD Required Reports	System Performance Measures Report (SPM)	October	November	February	March	Light Blue	Light Blue								Light Blue	Light Blue	Light Blue
	Longitudinal Systems Analysis (LSA)	October	December	January	April	Yellow									Yellow	Yellow	Yellow
	Housing Inventory Count (HIC)	January	February	April	May	Pink	Pink	Pink	Pink								
	Sheltered Point in Time (PIT)	January	February	April	May	Green	Green	Green	Green								
Orange County Required Reports	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February	Orange	Orange				Orange	Orange	Orange				Orange
	Emergency Shelter Project Performance Reports	May, November	June, December	n/a	July, January	Grey				Grey	Grey	Grey				Grey	Grey
	Transitional Housing Project Performance Reports	April, October	May, November	n/a	June, December				Purple	Purple	Purple				Purple	Purple	Purple
	Rapid Re-Housing Project Performance Reports	March, September	April, October	n/a	May, November			Cyan	Cyan	Cyan				Cyan	Cyan	Cyan	
	Homelessness Prevention Project Performance Reports	January, July	February, August	n/a	March, September	Green	Green	Green			Green	Green	Green				
	Permanent Supportive Housing/Other Permanent Housing Project Performance Reports	February, August	March, September	n/a	April, October		Orange	Orange	Orange				Orange	Orange	Orange		
	Data Quality Report Cards	January, April, July, October	January, April, July, October	n/a	February, May, August, November	Grey	Grey		Grey	Grey		Grey	Grey		Grey	Grey	
	Agency Audits	June	Specific to each agency	n/a	n/a							Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
HMIS User Recertifications	July	August	n/a	n/a								Pink	Pink				
HMIS Lead Meetings	HMIS User Meeting	Monthly meetings on 1st Wednesday @ 10:00AM	n/a	n/a	n/a	Light Blue	Light Blue			Light Blue							
	Data & Performance Management Meeting	Quarterly meetings on 2nd Thursday @ 1:00PM	n/a	n/a	n/a		Purple			Purple			Purple			Purple	

HMIS Participating Agencies Schedule



HMIS Participating Agencies Schedule

- HIC and Sheltered PIT
 - HIC and Sheltered PIT Office Hours - Feb 9th at 1 pm.
 - Agencies submit final HIC forms and PIT reports to 211OC - Feb. 13th
- Project Performance Report (PPR) Corrections
 - Homelessness Prevention 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 01/01/2023 - 12/31/2025
 - Please review the [PPR Webinars](#) for additional information about running and review PPR Goals 1 - 10 for your agency's programs

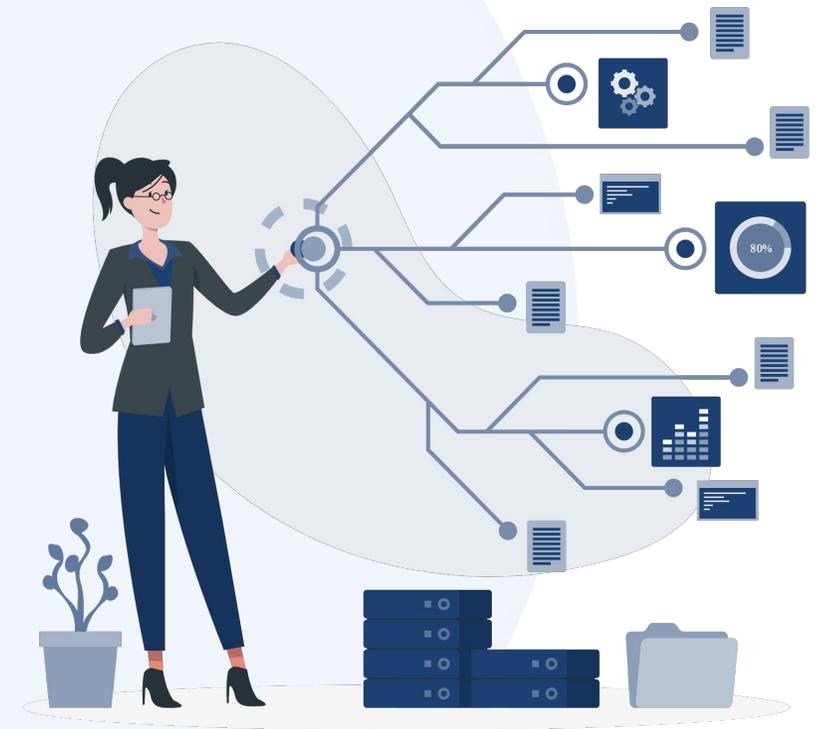


Graphic by: <https://storyset.com/online>

Reminder: HMIS Data Entry & Performance Impact

Data entered into HMIS is used to understand the characteristics of people served through the OC System of Care, and how effectively clients are being served through this system of care.

- Federal and State level: Data is aggregated for Orange County and submitted to inform how effectively our CoC is addressing homelessness as a system of care. Results of these reports impact the amount of funding our CoC will receive from these entities.
- Local level: In addition to reviewing data at the county-level, data is also aggregated at the project-level to inform how effective specific projects are at serving their clients. Local funders use this data to determine which agencies and projects they want to fund.



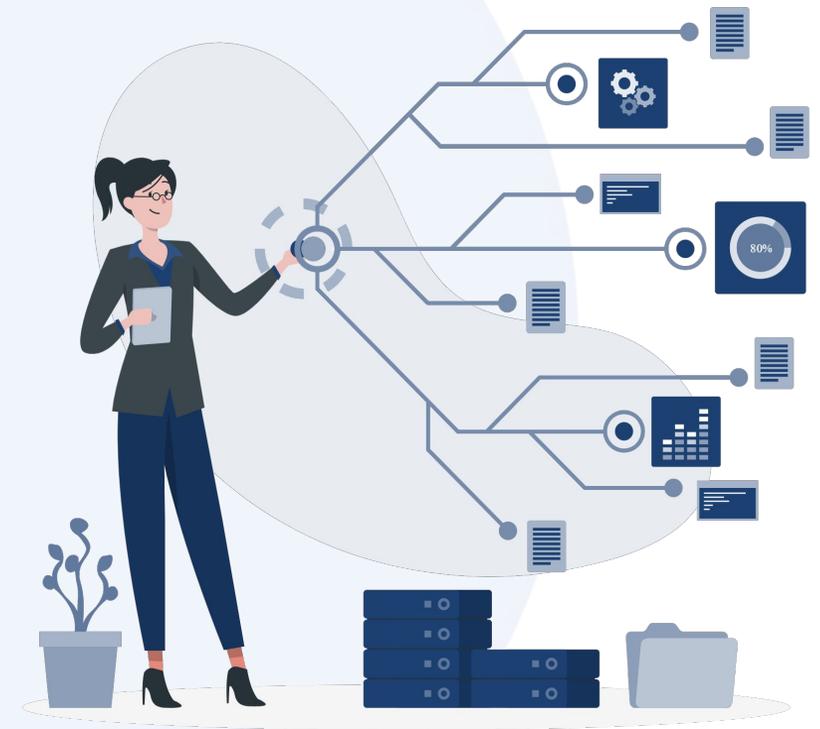
Graphic by: <https://storyset.com/online>

Reminder: HMIS Data Entry & Performance Impact

This means that accurate and complete data entry into HMIS is critical to ensure that your agency, and our CoC as a whole, continues to receive the funding needed to address homelessness in our community.

Data Entry & Data Quality Best Practices:

- Search for client records in HMIS prior to entering new clients to avoid duplicate profiles for the same client
- Confirm name spelling and review client documentation (if possible) to reduce data entry errors for Name, Date of Birth, and Social Security Number
- Enter data into HMIS directly instead of collecting data on a paper form
- Run data quality and performance reports at least quarterly to correct errors and identify areas for additional training
- Review data quality and performance correction files sent from the HMIS team, and update HMIS as needed
- Review knowledge base articles and training materials to understand how to collect specific data elements



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

Reminder: Privacy and Personal Identifying Information Guidance

A reminder about Client Privacy and Personal Identifying Information

Best practices for sharing client information:

- Users should only use the **client's unique identifier** to identify clients in correspondence. This includes HMIS tickets, reports, work emails, and work related instant messaging apps.
- If users must share additional client information such as name, date of birth, or Social Security Number in a report or correspondence, please use an encrypted email or password protected file on your work network. If you are sending a report to HMIS, please use your agency's DropBox.
 - [Sending Client Information to the HMIS Help Desk](#)



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

Client Consent and CES Enrollment

Client Rights

- Per the [HMIS Data Standards](#), the client always has a right to privacy and can refuse to provide their information without being denied service. However, some information may be required to determine program eligibility.
 - a. Clients may provide or refuse/revoke consent at any time.

HMIS is a shared data system; consent is required to share information.

- If Client has an HMIS Record, participates in CES and wish to revoke their consent to share their data:
 - Upload signed Client Revocation of Consent Form
 - Submit an HMIS Help Desk ticket including the client identifier
 - HMIS staff will anonymize the client record
 - Anonymizing a client record does not impact Coordinated Entry System Enrollment (CES)
 - The client's profile will remain public and visible to participating agencies



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

Client Consent and CES Enrollment Cont.

If Client has an HMIS Record Continued

- This allows agencies to continue coordinating housing referrals and services without interruption
- Any agency that is still working with the client will continue to log services into their anonymized record
- If the client begins working with a new agency, that agency will need to create a private record in HMIS to record the client's information

If Client **does not** have an HMIS Record and will participate in CES

- Create client profile
- Set Release of Information to No and push the Consent Refused toggle forward
- Keep the profile public so you can enroll the client into your agency's program and also in County of Orange's CES program

For reference, please review our KB article [Creating Client Records without Client-Identifying Information](#) and [Refusing/Revoking Consent to Share Personal Information](#)

The screenshot shows a web form for creating a new client. The form is titled "CREATE A NEW CLIENT" and is divided into three main sections: "CREATE A NEW CLIENT", "RELEASE OF INFORMATION", and "CONSENT REFUSED".

- CREATE A NEW CLIENT:** This section contains several dropdown menus and text input fields. The "Social Security Number" field is pre-filled with "000 - 00 - 0000". The "Quality of SSN" dropdown is set to "Client prefers not to answer". The "Last Name" field is "Refused". The "First Name" field is "Automatically Generated". The "Quality of Name" dropdown is "Client prefers not to answer". The "Quality of DOB" dropdown is "Client prefers not to answer". The "Middle Name" dropdown is "None". The "Gender" dropdown is "Select". The "Race and Ethnicity" dropdown is "Select". The "Additional Race and Ethnicity Detail" field is empty. The "OC CUSTOM QUESTIONS" section includes "Alias", "Pronoun(s)" (set to "Select"), and "Federally Recognized Tribe" (set to "Select").
- RELEASE OF INFORMATION:** This section has a "Permission" dropdown set to "No", a "Start Date" of "09/04/2024", and an "End Date" field.
- CONSENT REFUSED:** This section has a "Consent Refused" toggle switch turned on.

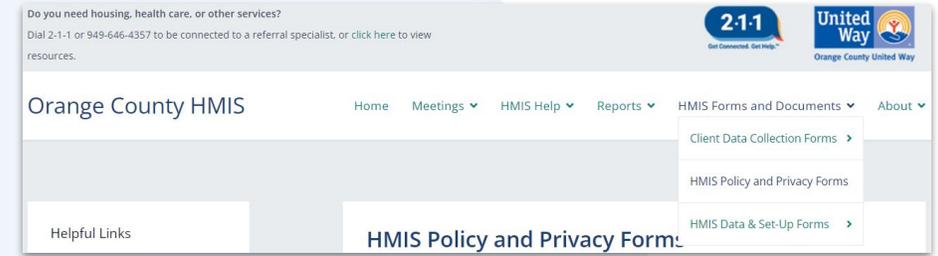
Yellow boxes with numbers 2, 3, 4, 5, and 6 are placed over specific elements in the form: 5 is over the Permission dropdown, 3 is over the Quality of DOB dropdown, 4 is over the Gender dropdown, 2 is over the Consent Refused toggle, and 6 is over the ADD RECORD button.

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/>



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?](#)

Happy Fox Account Cont.

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)

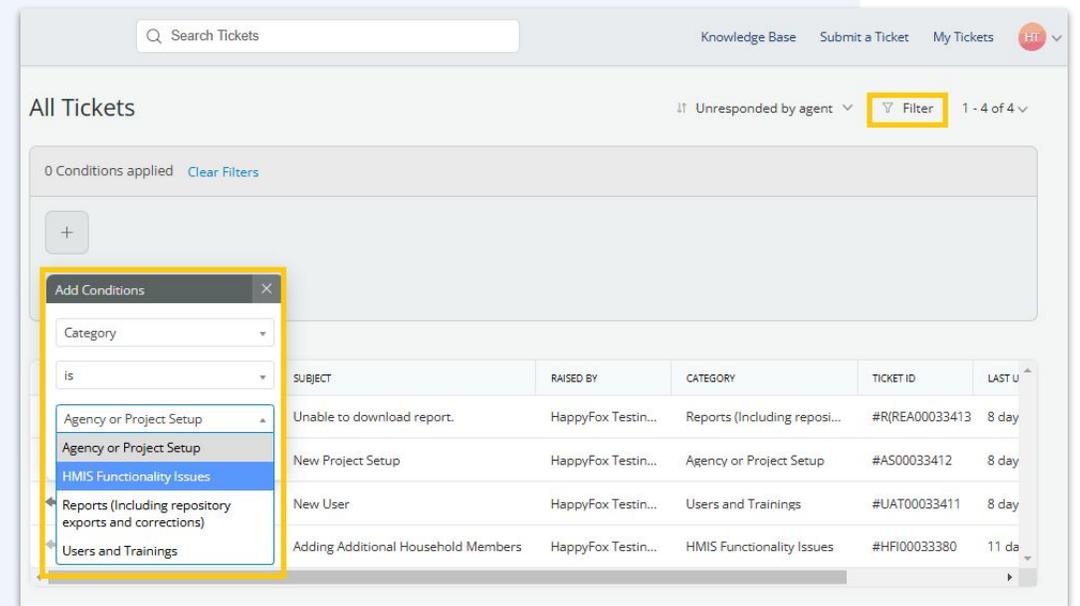
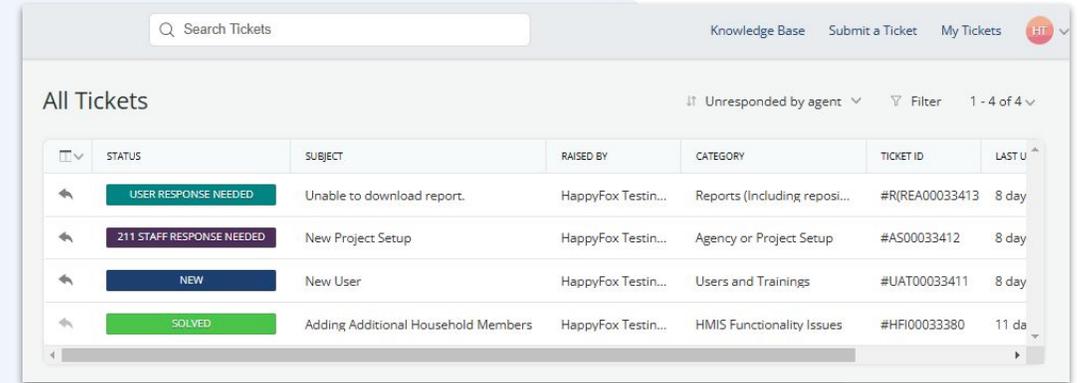
Happy Fox Account Cont.

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.



System Performance Measure

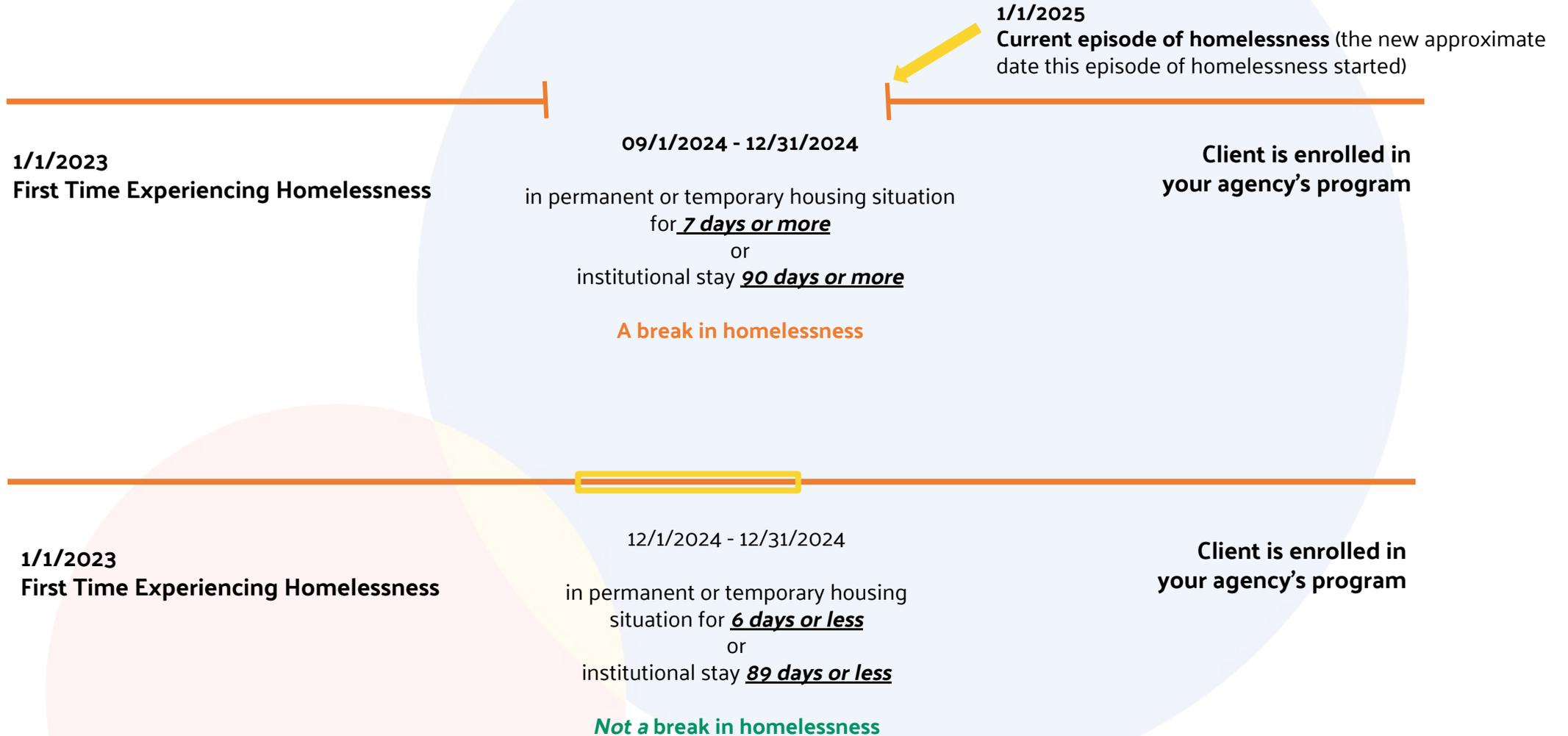
HDX 2.0 officially opens for System Performance Measure (SPM) submission on 2/2.

Measure 1: Length of Time Persons Remain Homeless

Data Element: 3.917 Prior Living Situation

- Approximate date ***this episode*** of homelessness started
 - Have the client look back to the date of the last time the client had a place to sleep that was not on the streets, emergency shelter, or safe haven.
 - Including the situation the client was in right before entering, plus any continuous time moving around between the streets, an emergency shelter, or a safe haven, determine the date this period of the client's experience of "literal" homelessness began.
 - The look back time would not be broken by a stay of less than 7 consecutive nights in any permanent or temporary housing situation nor would it be broken by an institutional stay of less than 90 days (i.e., jail, substance use or mental health treatment facility, hospital, or other similar facility).

System Performance Measure



2026 HIC and Sheltered PIT Reminder

Thank you!

Thank you for all of your help in getting our data ready for the submission of the 2026 HIC & Sheltered PIT!

Agencies with any of the following project types, whether or not those projects are in HMIS, are expected to participate in the [HIC/Sheltered PIT](#):

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

What's Next?

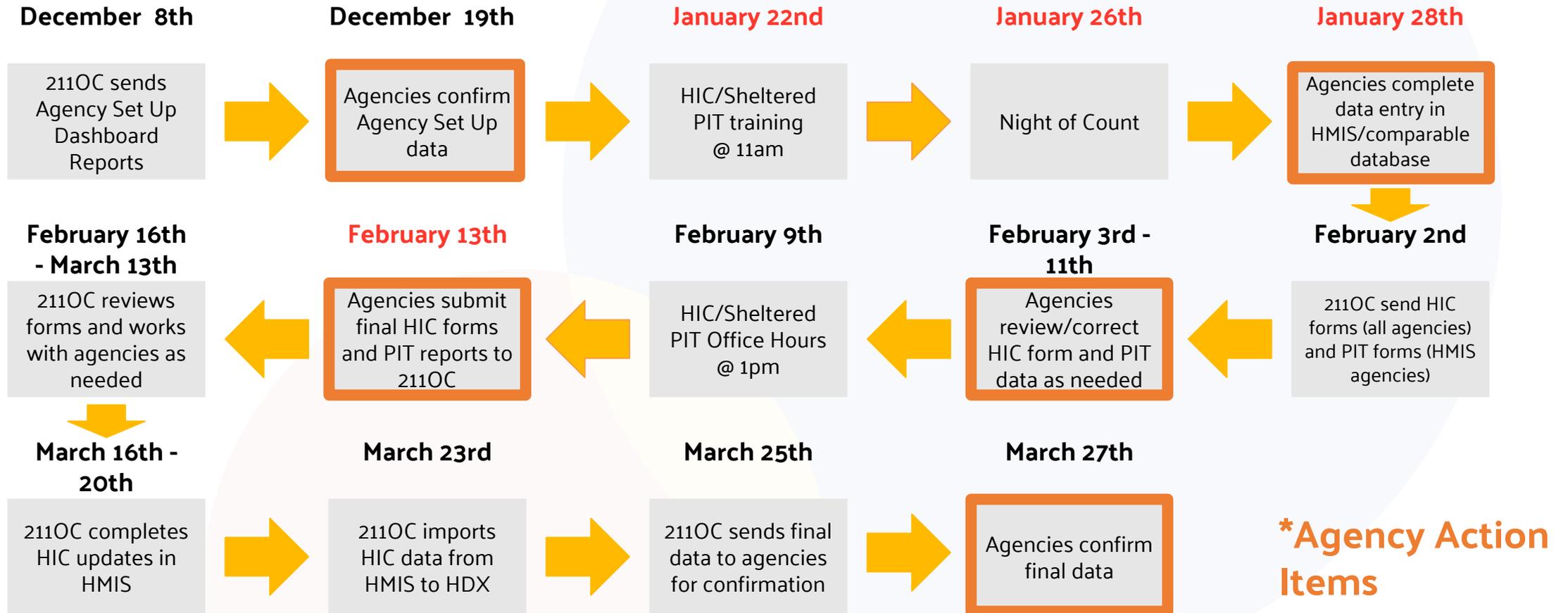
Tues 02/03/26 - Wed 02/11/26

Agencies will review and correct any HIC/PIT Data as needed. AAs were sent the Sheltered PIT/HIC Forms from our Team.

HIC/Sheltered PIT Office Hours 02/09/26 @ 1PM



2026 HIC and Sheltered PIT Timeline



2026 HIC and Sheltered PIT Dashboard

2026 HIC and Sheltered PIT Data Dashboard (Training Site) 1h ago

Agency Name: Program Name:

ES Entry/Exit, SH, and TH - Active Clients

Household Type	Programs Full Name	Households With Chil...	Households Without C...
		Number of Clients	Number of Clients
HIC/PIT Test Agency - HIC/PIT Emergency Shelter ESG		2	1

ES Entry/Exit, SH, and TH - Client Details

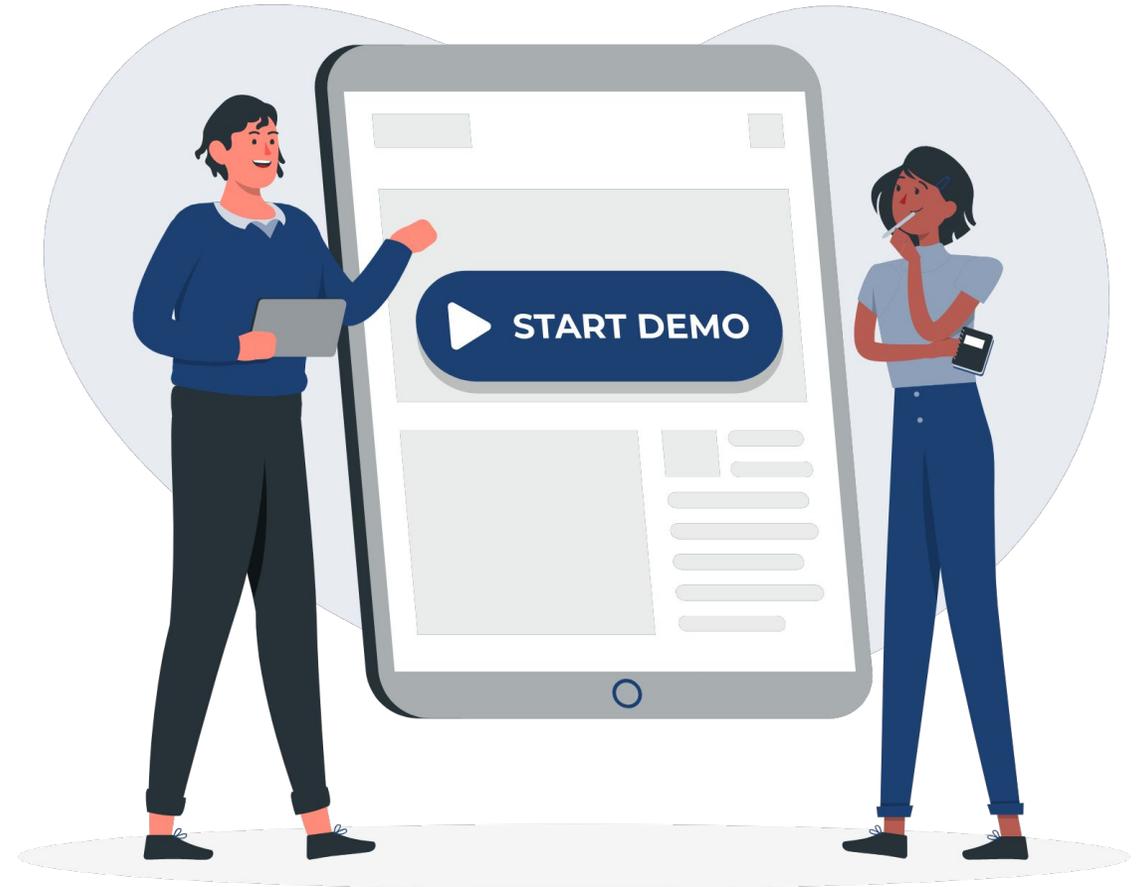
Programs Full Name	Clients Unique	Clients First Name	Clients Last	Clients Gender	HMIS Glos...	Pro
HIC/PIT Test Agency - HIC/PIT Emergency Shelter ESG	90568D974	Pete	Dane	Man (Boy, if child)	25	Em
HIC/PIT Test Agency - HIC/PIT Emergency Shelter ESG	619940571	Charlie	Tuna	Man (Boy, if child)	44	Em
HIC/PIT Test Agency - HIC/PIT Emergency Shelter ESG	0D11CD861	Bluie	Tuna	Man (Boy, if child)	5	Em

Emergency Shelter, Safe Haven, and Transitional Housing Projects: Confirm number of occupied beds

Permanent Supportive Housing, Other Permanent Housing and Rapid Rehousing Projects: Confirm number of clients with HMIDs (Housing Move-in Dates)

Use Client Details Section to identify those clients.

HIC & Sheltered PIT Dashboard Demo



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

PPR Goal 2 - Overview

Goal 2 - Clients enrolled in Street Outreach, Emergency Shelter, and Transitional Housing projects **spend as little time as possible experiencing homelessness** in these project types before moving to more stable housing situations.

- Data collected for clients active during the reporting period
- Applicable Project Types & Targets:
 - Street Outreach: ≤ 65 Days
 - Emergency Shelter: ≤ 30 Days
 - Transitional Housing: ≤ 180 Days



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

PPR Goal 2 - Overview

- This measure is calculated by counting the number of days between the client’s **Project Start Date** and **Project Exit Date or Reporting Period End Date (whichever is earlier)** for Street Outreach, Transitional Housing, and Emergency Shelter Entry/Exit projects.
- For Emergency Shelter Night-By-Night projects, this measure is calculated by **counting the number of bed night services provided** during the enrollment.

KB: [Street Outreach Exiting Protocol](#) & [Project Exit Date](#)

Project	Project Exit Date in HMIS
Street Outreach	<p>Clients enrolled in Street Outreach projects should be exited in the following manner:</p> <ul style="list-style-type: none"> • If a client is referred to an Emergency Shelter (ES) or Transitional Housing (TH) project, the client should be exited on the date the client enrolled into the ES or TH project. • If the client was referred to a Rapid Re-Housing (RRH), Permanent Supportive Housing (PSH), or Other Permanent Housing (OPH) project, the client should be exited from the SO project with an exit date of the client's Housing Move-in Date in the project they were referred to. • If staff has not made any contact with the client within 60 days of the last contact date.
Site Based Residential Projects: Emergency Shelter/Transitional Housing	The last day of continuous stay in the project before the client transfers to another residential project or otherwise stops residing in the project.
Tenant-based Permanent Housing projects: Permanent Housing, including Rapid Rehousing	The last day the client receives rental assistance or supportive services (RRH) or is provided rental assistance (tenant-based PSH, transition-in-place, or other permanent housing).
Non-residential projects: Services Only, Homelessness Prevention	The last day a service was provided or the last date of a period of ongoing service.

PPR Goal 3 - Overview

Goal 3 - Clients enrolled in Homeless Prevention projects **spend as little time as possible in a Homelessness Prevention** project by receiving services that stabilize their housing situation as quickly as possible.

- Data collected for clients active during the reporting period
- Applicable Project Type & Target:
 - Homelessness Prevention: ≤ 60 Days
- This measure is calculated by counting the number of days between the client's **Project Start Date** and **Project Exit Date or Reporting Period End Date (whichever is earlier)**.

The screenshot displays a software interface for client management. At the top, there is a navigation bar with tabs: 'Enrollment' (highlighted with an orange box), 'History', 'Assessments', 'Goals', 'Notes', 'Files', and 'Forms'. An 'X Exit' button is located in the top right corner. Below the navigation bar, the section is titled 'Enroll Program for client'. It features a form with a label 'Project Start Date' (indicated by an orange arrow) and a value of '06/01/2025'. To the right of the date is a calendar icon with the number '25'. Below this, there is another navigation bar with tabs: 'Enrollment', 'History', 'Assessments', 'Goals', 'Notes', 'Files', and 'Forms'. The 'Enrollment' tab is highlighted, and an 'X Exit' button is highlighted with an orange box in the top right corner. Below this second navigation bar, the section is titled 'End Program for client'. It features a form with a label 'Project Exit Date' (indicated by an orange arrow) and a value of '07/30/2025'. To the right of the date is a calendar icon with the number '25'.

PPR Goal 4 - Overview

Goal 4 - Households in RRH/PSH-OPH projects move into **permanent housing as quickly as possible** to reduce the amount of time clients remain homeless.

- Data collected for clients active during the reporting period
- Applicable Project Types & Targets:
 - Rapid Re-Housing (RRH): ≤ 30 Days
 - Permanent Supportive Housing and Other Permanent Housing (PSH-OPH): ≤ 30 Days



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

PPR Goal 4 - Housing Move-In Date

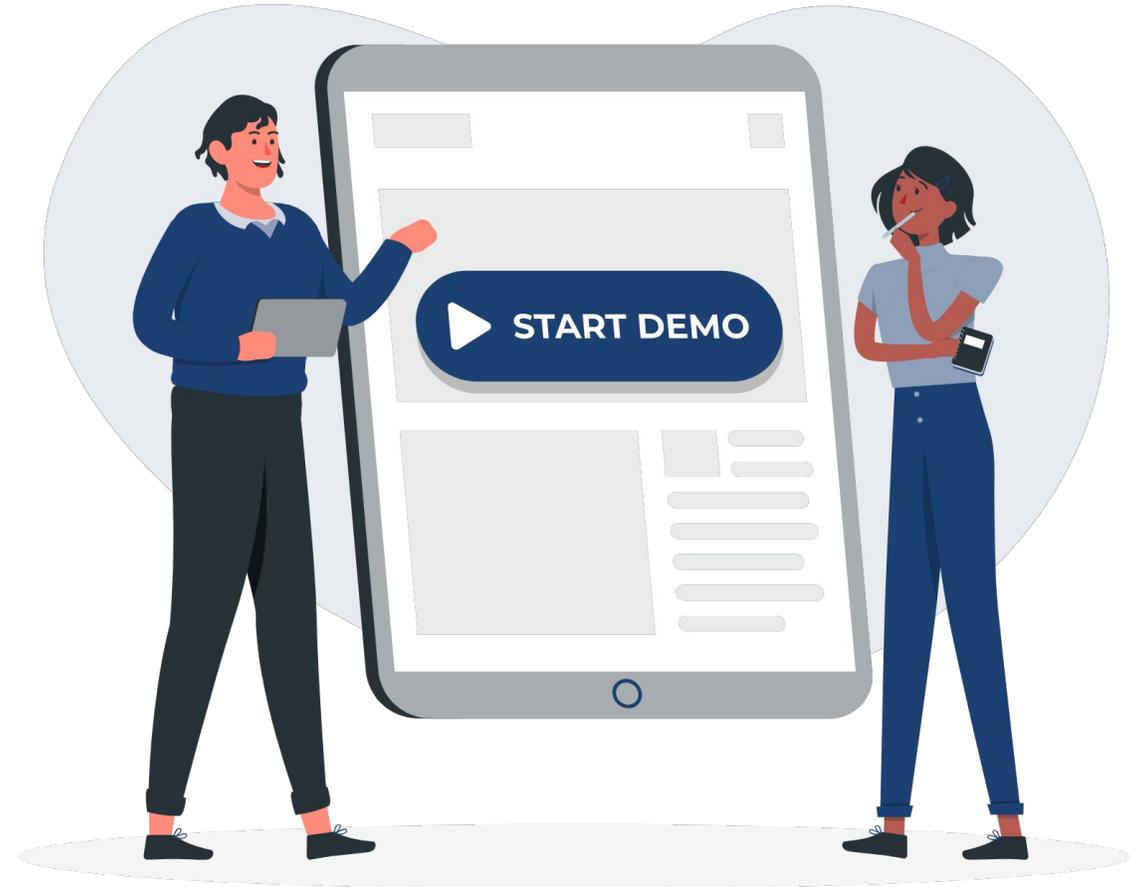
This measure is calculated by counting the number of days between the client's **Project Start Date** and **Housing Move-In Date**.

A 'Housing Move-In Date' must be recorded at the point the household moves into a permanent living situation. "Move-in" means a lease arrangement has been made, the client has a key or entry ability to the unit, and that the **client has physically slept in the unit**.

KB: [Housing Move In Date](#)

The screenshot shows a software interface with a navigation bar at the top containing 'Enrollment', 'History', 'Assessments', 'Goals', 'Notes', 'Files', and 'Forms'. The 'Enrollment' tab is highlighted with an orange border. Below the navigation bar, the text 'Enroll Program for client' is displayed. There are two main data entries: 'Project Start Date' with the value '07/01/2025' and a calendar icon, and 'Housing Move-In Date' with the value '07/28/2025' and a calendar icon. Between these entries is a section titled 'TRANSLATION ASSISTANCE NEEDED' with a dropdown menu for 'Translation Assistance Needed' set to 'No'. Below this is a note: 'COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT'.

Project Performance Report Dashboard Demo



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

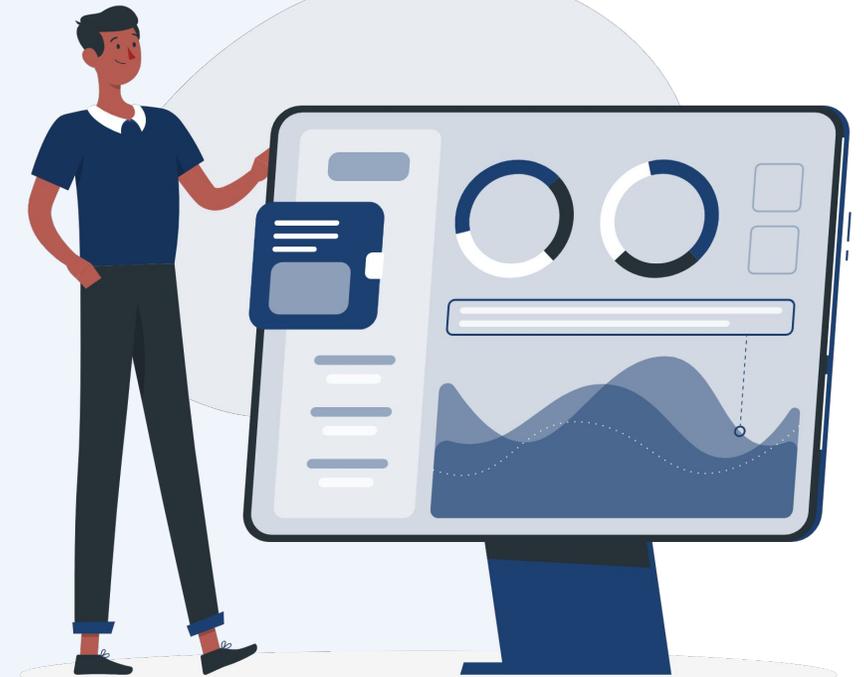
Project Performance Report (PPR)

The Street Outreach (SO) 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 Homelessness Prevention 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.



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

Reactivation Training

The HMIS Team has updated the account reactivation workflow. To streamline the account reactivation process, users whose HMIS accounts were disabled due to inactivity must now complete the HMIS Reactivation Training course.

In order to reactivate HMIS accounts, users will need to:

1. Complete the HMIS Reactivation Training course
2. Complete the HMIS Skills Test

Once all training materials have been completed, agency administrators can submit an [HMIS Account Update & Testing Form](#) to the HMIS Helpdesk to have user accounts reactivated



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](#).

Additional CES Information:

- [ICES Training Materials](#)
- [FCES Knowledge Base Library](#)



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

Training and Resources - HIC/PIT

2026 HIC and Sheltered PIT Office Hours

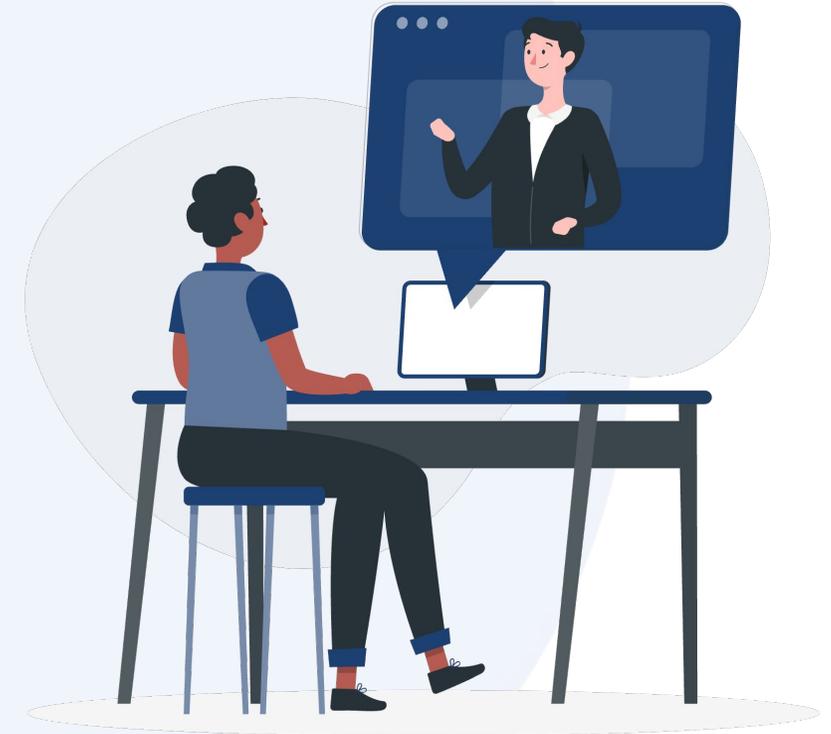
The HMIS Team will be hosting the 2026 HIC and Sheltered PIT Office Hours on:

Monday, February 9th, 2026 @ 1:00PM

[Click here](#) to Join!

Meeting ID: 826 9262 9243

Registration is not Required.



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

Data and Performance Management Meeting

Agenda:

- Quarterly Report Review:
 - Project Performance Reports: Permanent Supportive Housing - Other Permanent Housing and Rapid Rehousing Projects and Transitional Housing
 - Q4 Data Quality Report Cards
 - Monthly Data Quality Reports Discussion

Thursday, February 19th, 2026 @ 1:00PM

[Click here](#) to Join!

Meeting ID: 857 7837 0017

Passcode: 463529

Registration is not Required. Feel free to review the [OC HMIS Calendar](#) to find upcoming HMIS meeting details.



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

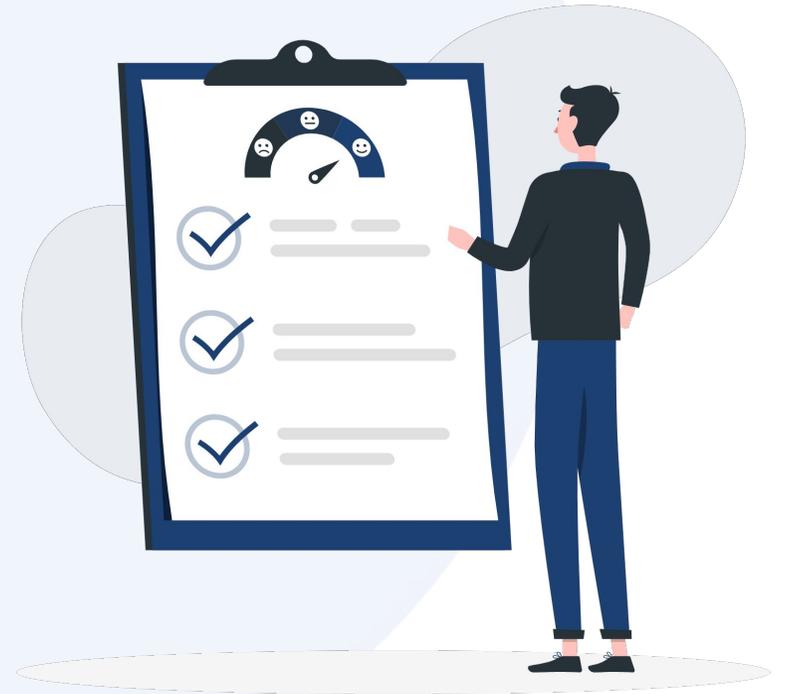
HMIS User Meeting Survey

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/KfRaeiXTXDQ82n5V7>

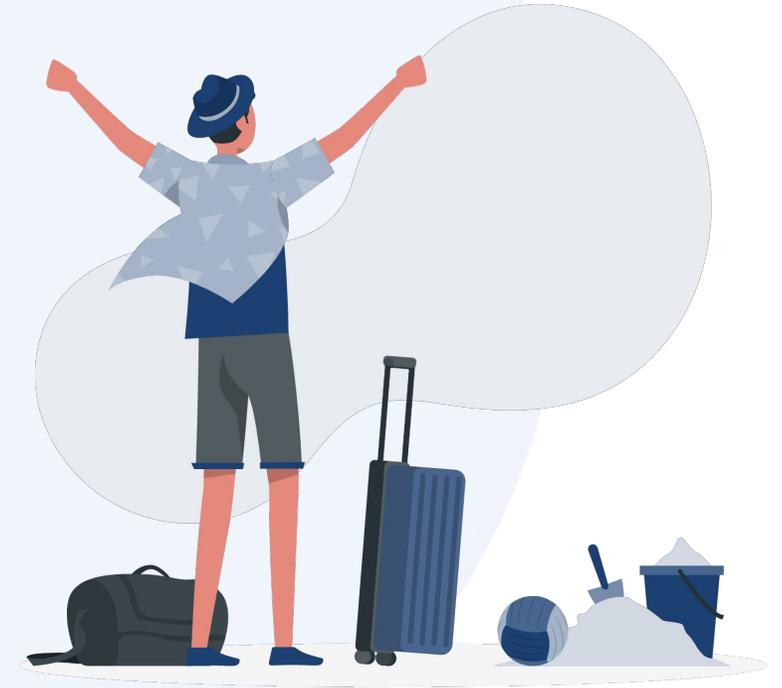


Holidays

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

Friday, February 13th and **Monday, February 16th** in observance of **President's Day**.

We will be back in office **Tuesday, February 17th**, to assist you.



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](#)



**Thank you
Have a great day!**

Next User Meeting: March 4th





Orange County
UNITED WAY