

OC HMIS User Meeting Webinar Minutes
02/04/26

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Agenda Items

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

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

[HMIS Participating Agencies Schedule](#)

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.

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

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](#)

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

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](#)

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 live list of all agencies that participate in OC HMIS can be found at:

<https://ochmis.org/contributing-agencies/>

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.

System Performance Measure

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

OC HMIS Team encourages Agency Admins and HMIS Users to continue to review agency enrollment data for accuracy for the reporting period 10/01/2024 - 9/30/2025.

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).

HIC and Sheltered PIT Reminder

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

Tues 02/03/26 - Wed 02/11/26: Agencies will review and and correct any HIC/PIT Data as needed. Agency Admins were sent the Sheltered PIT/HIC Forms from our Team. HIC/Sheltered PIT Office Hours: 02/09/26 @ 1PM.

Next on the timeline, we have February 13th, where agencies will submit those final HIC/PIT numbers. After that, we'll review forms and work with agencies as needed to finalize our 2026 HIC/Sheltered PIT data to HUD..

2026 HIC and Sheltered PIT Data Dashboard

Agencies are encouraged to use the 2026 HIC & Sheltered PIT Data Dashboard to ensure their data is accurate. This dashboard will show the number of participants, household composition, enrollment start dates, Housing Move-in Dates (HMIDs), and details of those clients. In the live site, this may be found by navigating to *Reports*→*Data Analysis*→*Orange County Clarity System Reports*→*HIC/PIT*→***2026 HIC and Sheltered PIT Data Dashboard***.

Emergency Shelter, Safe Haven, and Transitional Housing Projects: Please confirm the number of occupied beds. Permanent Supportive Housing, Other Permanent Housing and Rapid Rehousing Projects: Please confirm the number of participants with HMIDs (Housing Move-in Dates).

Please see the Client Details tile for specifics such as: participant name, UID, age, etc.

Project Performance Report - Goal 2, 3, and 4 Overview

Project Performance Reports 2, 3, and 4 focus on decreasing the lengths of time a participant spends homeless.

Goal 2 - Decrease Length of Stay in Temporary Shelter & Outreach

- Street Outreach <=65 Days

- Emergency Shelter <=30 Days
- Transitional Housing <=180 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) 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. For more information please refer to the following Knowledge Base articles [Street Outreach Exiting Protocol](#) and [Project Exit Date](#)

Goal 3 - Decrease Length of Time in Prevention projects

- 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)

Goal 4 - Place Households in Units As Soon As Possible

- Rapid Re-Housing <=30 Days
- PSH-OPH <=30 Days

This measure is calculated by counting the number of days between the client's Project Start Date and Housing Move-In Date. For more information please refer to the following Knowledge Base article [Housing Move In Date](#)

Agencies should regularly run the Project Performance Reports for their project types available in Clarity under launch pad > Reports > Data Analysis > Orange County Clarity System Reports > Project Performance Reports

Agencies can review how their projects performed on the applicable goals compared to the targets determined by the OC CoC. If projects are exceeding the goal target agencies can access the drill down features on some of the report tiles to evaluate which client records may need review for data entry errors or run the Project Performance Details Report for client level data for the same purpose.

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.

Project Performance Report

- The Street Outreach (SO) PPR will be published in the upcoming weeks.
- Corrections for the Homelessness Prevention PPR draft data will be uploaded into DropBox this week.
- Current and past PPRs can be found on the [Orange County HMIS website](#), by navigating to: Reports > [Project Performance Reports](#)

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:

- Complete the HMIS Reactivation Training course
- 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 can be found below:

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

HIC/PIT Office Hours

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

Monday, February 9th @ 1:00PM

Click here to Join!

Meeting ID: 826 9262 9243

Registration is not Required. Feel free to review the OC HMIS Calendar to find upcoming HMIS meeting details.

Data and Performance Management Meeting

The HMIS Team will be hosting the upcoming Data and Performance Management Meeting on:

Thursday, February 19th @ 1:00PM

[Click here](#) to Join!

Meeting ID: 857 7837 0017

Passcode: 463529

The following topics will be on the agenda:

- 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

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

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/KfRaeiXTXDQ82n5Vz>

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

Privacy and Personal Identifying Information Guidance

- Best practice with sharing PII, no PII should be shared in HMIS tickets, reports, work emails, and work related instant messaging apps. If PII must be shared to discuss/review data quality, 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.
- Q: How should an agency administrator share reports with the HMIS Helpdesk?
 - A: Agency administrators should upload reports to their agency's DropBox folder, and then inform the Helpdesk about the report in a ticket. If an agency administrator does not have access to their agency's DropBox folder, they should submit a ticket to gain access.

System Performance Measure - Prior Living Situations

- Q: What counts as an institutional/temporary housing situation?
 - A: Staff can reference HUD's [2026 Data Standards Manual Appendix A - Living Situation Response Categories and Descriptions](#) for a detailed list of all prior living situation categories

System Performance Measure - Reports Response Option

- Q: What does the "PNTA" response option mean within reports?
 - A: "PNTA" is shorthand for client prefers not to answer

System Performance Measure - Length of Homelessness (LOH)

- Q: What should agency administrators do if there is a discrepancy between a client's self-reported LOH and the information reported in HMIS? What kind of documentation is needed to support the "correct" LOH?
 - A: Since LOH is a self-reported field, users should thoroughly explain the data element to clients so that they understand the intent behind collecting information related to their approximate date of homelessness started for this current episode. If there are sources such as documentation collected and the date does not match the self-reported date, follow up and further discuss with the client to verify the current episode of homelessness and update the date field as needed to collect an accurate date. If any discrepancies emerge, agency administrators should submit a ticket to the HMIS Helpdesk for additional guidance.

User Meeting Presentation

- Q: Where can users find the presentation after the meeting ends?
 - A: All meeting materials are uploaded to the OC HMIS website under the [HMIS User Meeting Materials](#) tab soon after the meeting concludes.

Future Meeting Information

March 2026 HMIS User Meeting Webinar

- Date: Wednesday, March 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.