

# April 2026 HMIS Agency Admin Training

*Please enter your agency's  
full name in the chat box  
for attendance.*

# 211

Get Connected. Get Help.™



Orange County  
**UNITED WAY**

# Agenda

1. Getting Set-Up as an Agency Administrator
2. Managing HMIS Users
3. Best Practices for Submitting Tickets
4. Data Quality Importance
5. Components of Data Quality
6. Data Quality Report Cards
7. Data Quality Management
8. Demos of Reports
9. Q&A

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.

# PART I

## HMIS Agency Administrator Responsibilities





# Getting Set-Up as an Agency Administrator



# Agency Admin Set-Up Checklist

Agency admins are the people responsible for overseeing and managing their agency's data in HMIS. To prepare for this role, agency admins should check to ensure they have access to the following:

- HMIS account
- Training account
- HappyFox account
- Dropbox access
- Mailchimp mailing list
- Looker mailing list



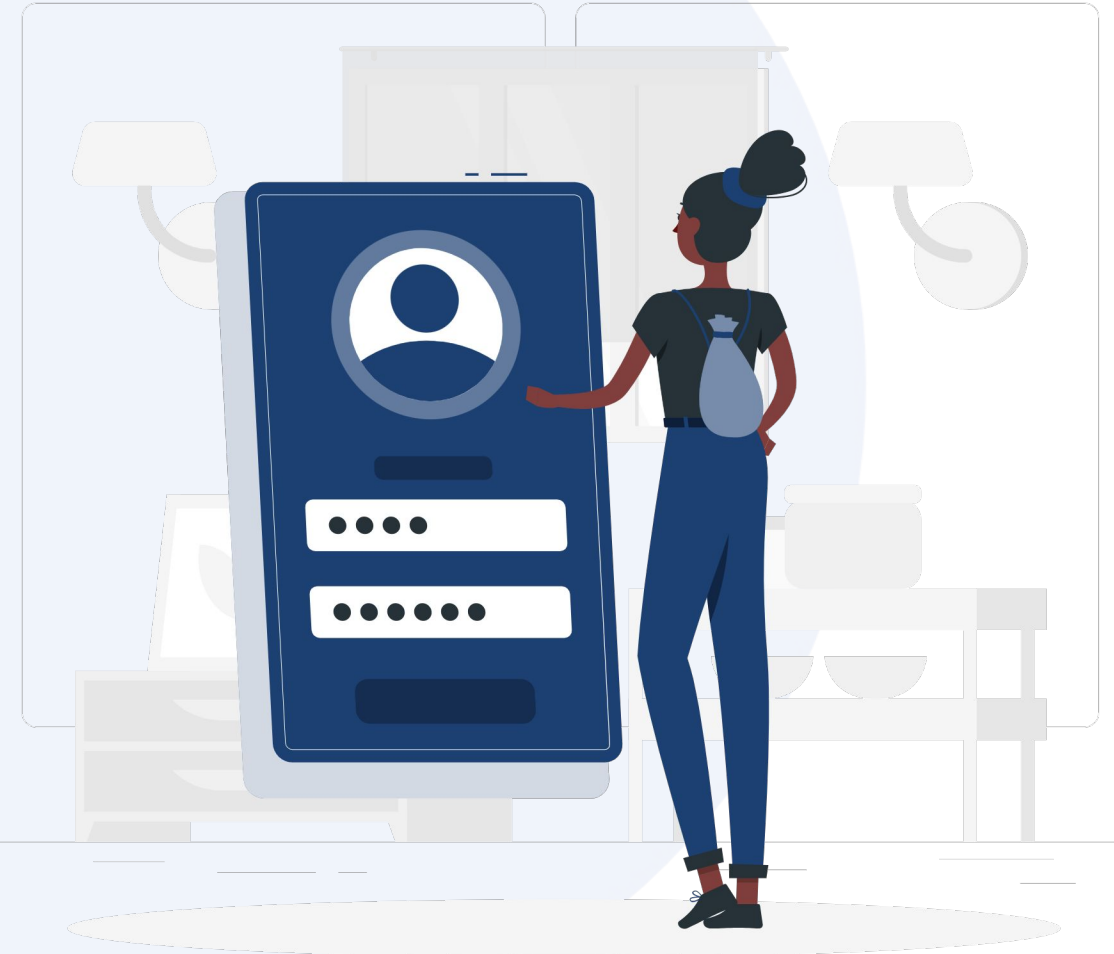
Graphic by: <https://storyset.com/online>

# Checklist - HMIS Account

Agency admins are responsible for maintaining an active HMIS account. With an HMIS account, agency admins can easily monitor their agency's data, oversee their users and run built-in reports.

Without an active HMIS account, agency admins would be severely limited in their ability to carry out their management duties.

Agency admins should login to HMIS at least once a month to review their agency's data, even if no major changes/updates have occurred.



[Graphic by: https://storyset.com/online](https://storyset.com/online)

# Checklist - Training Account

Agency admins are responsible for maintaining an active agency training account for staff at their agency to use.

Agency admins must create a memorable training account password to share with their staff. Since training accounts are shared by all users within an agency, agency admins should remind their staff not to modify the login credentials.

When an agency admin joins/leaves an agency, the email address associated with the training account may need to be updated to reflect changes in the composition of agency admin(s).



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

# Checklist - HappyFox Account

HappyFox is the ticketing software the Help Desk uses to communicate with agency admins. Although agency admins can submit tickets via our [ticketing portal](#), it is more convenient to create a HappyFox account to manage tickets.

With a HappyFox account, agency admins can easily submit, respond and track support tickets. This increased coordination streamlines the process for the Help Desk to resolve tickets.

For more information on this topic, please reference our [Creating a HappyFox Help Desk Account](#) KB article.



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

# Checklist - Dropbox Access

Dropbox is the file hosting service that the Help Desk uses to securely share documents with agency admins.

The Help Desk routinely uploads data quality corrections and other pertinent documents to Dropbox for agency admins to review. Access to Dropbox is essential for agency admins to carry out their data management tasks.

For more information on this topic, please reference our [Creating a Dropbox Account](#) and [Accessing your Agency's Dropbox Folder](#) KB articles.



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

# Checklist - Mailchimp Mailing List

Mailchimp is the email platform the Help Desk uses to send newsletters to users. These newsletters often contain important information regarding upcoming meetings, training sessions and other community resources.

Agency admins should ensure that they are subscribed to the following mailing lists:

- HMIS newsletter
- Agency Admin newsletter
- Data and Performance Management Meeting newsletter
- HIC-PIT newsletter (only for agencies with eligible projects)



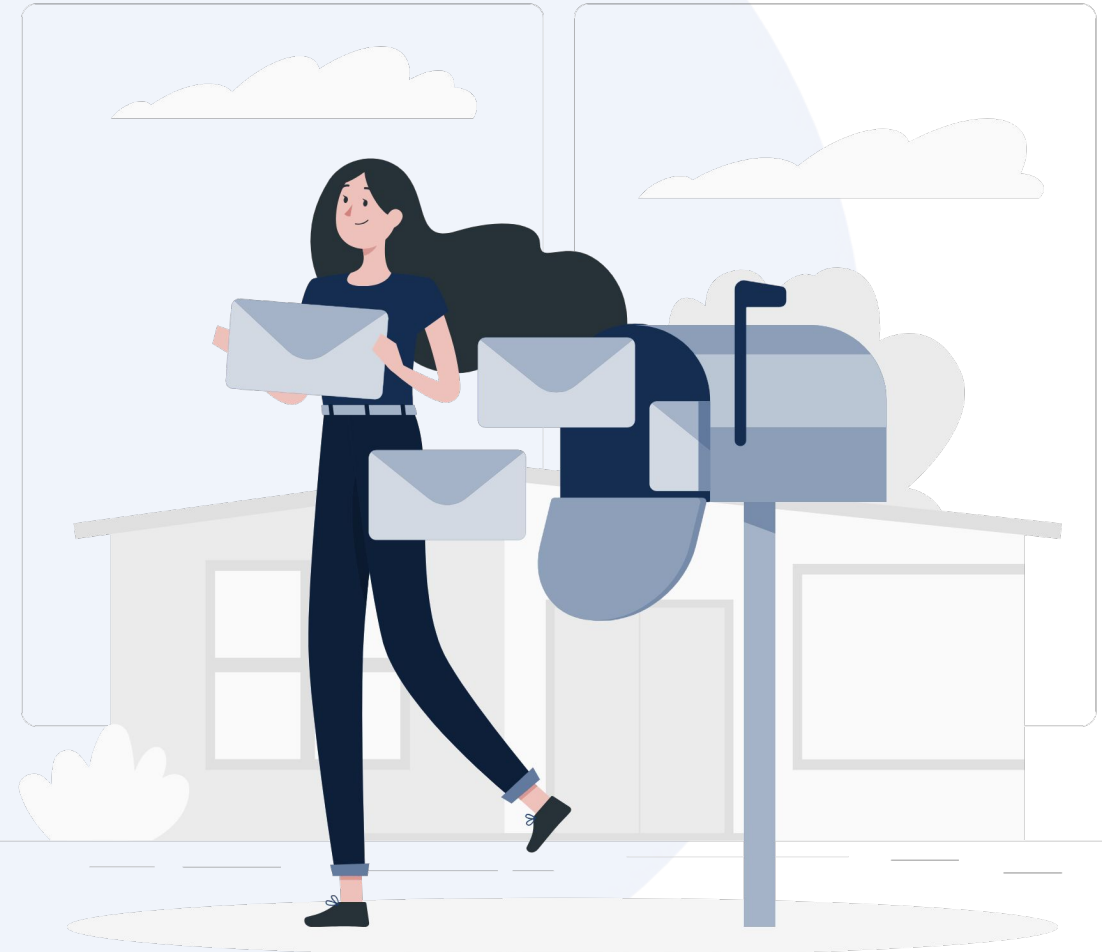
Graphic by: <https://storyset.com/online>

# Checklist - Looker Mailing List

The Help Desk utilizes Looker's built-in mailing functionality to send out canned reports to agency admins.

Our team has a set list of canned reports regarding data quality that are regularly sent out to agency admins, and new canned reports can be created upon request.

NOTE: The CES Leads/Admins operate their own set of mailing lists. The Help Desk cannot add users to those mailing lists.



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

# RECAP: Getting Set-Up

To carry-out their duties, agency admins should have access to:

- An active HMIS account
- An agency HMIS training account
- A Help Desk HappyFox account
- 211OC's shared Dropbox folder
- Emails from Mailchimp
- Emails from Looker



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



# Managing HMIS Users



# Managing HMIS Users

In addition to overseeing and managing agency data, agency admins are responsible for managing all users at their agency.

The primary day-to-day role of agency admins revolves around:

- Identifying users who need access to HMIS
- Providing onboarding to new users
- Conducting additional training as needed
- Notifying the HMIS Help Desk to create/update/disable user accounts

Agency admins are also responsible for relaying important HMIS-related news with their users.



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

# New User Onboarding

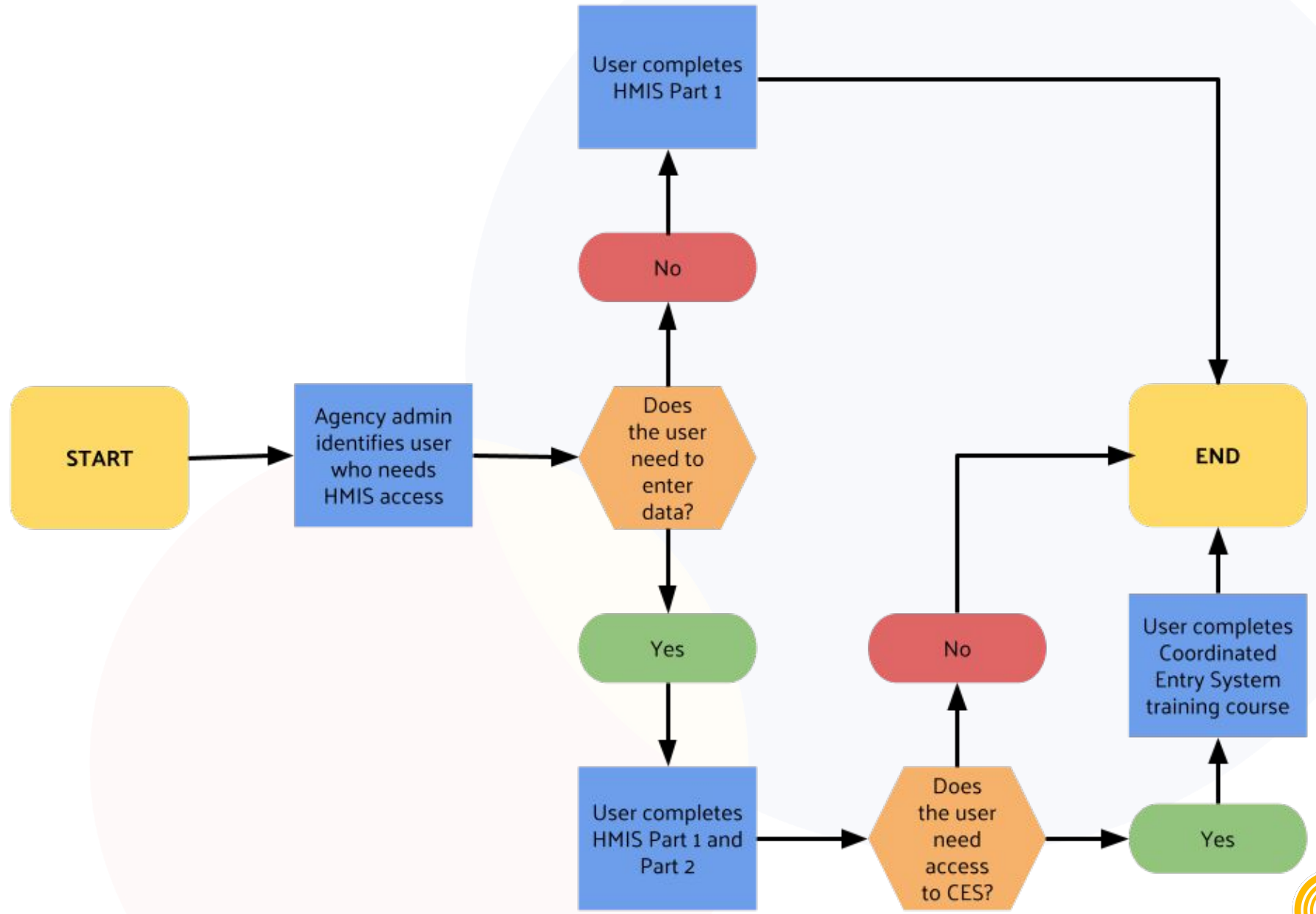
In HMIS there are three (3) general access roles:  
Read Only, Agency Staff (Data Entry) and CES  
Agency Staff

Each access role has a specific set to training requirements that need to be completed in order to gain access to HMIS:

- Read Only
  - HMIS Part 1
- Agency Staff
  - HMIS Part 1 and Part 2
- CES Agency Staff
  - HMIS Part 1 and Part 2, Coordinated Entry System training



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



# Coordinated Entry System Access

The Coordinated Entry System (CES) is an autonomous system within HMIS that is operated by the CES Leads/Admins.

Only agencies who are certified CES Access Points can request for their users to be granted CES Agency Staff access. Approval is granted at the discretion of the CES Leads/Admins.

Agency admins who want their agency to become a CES Access Point can submit a ticket to the Help Desk for our team to connect them with CES Leads/Admins.



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

# Reactivating Disabled User Accounts

Clarity HMIS will automatically disable user accounts after a sixty (60) day period of inactivity. To prevent this from occurring, users should set-up a monthly calendar reminder to login to HMIS.

Users with Agency Staff, CES Agency Staff or Agency Administrator access will need to complete the HMIS Reactivation training course to regain access to their accounts.

Users with Read Only access will need to retake the HMIS Part 1 training course.

NOTE: Read Only users can only successfully retake the HMIS Part 1 training course **AFTER** the Help Desk team is informed to reset it.



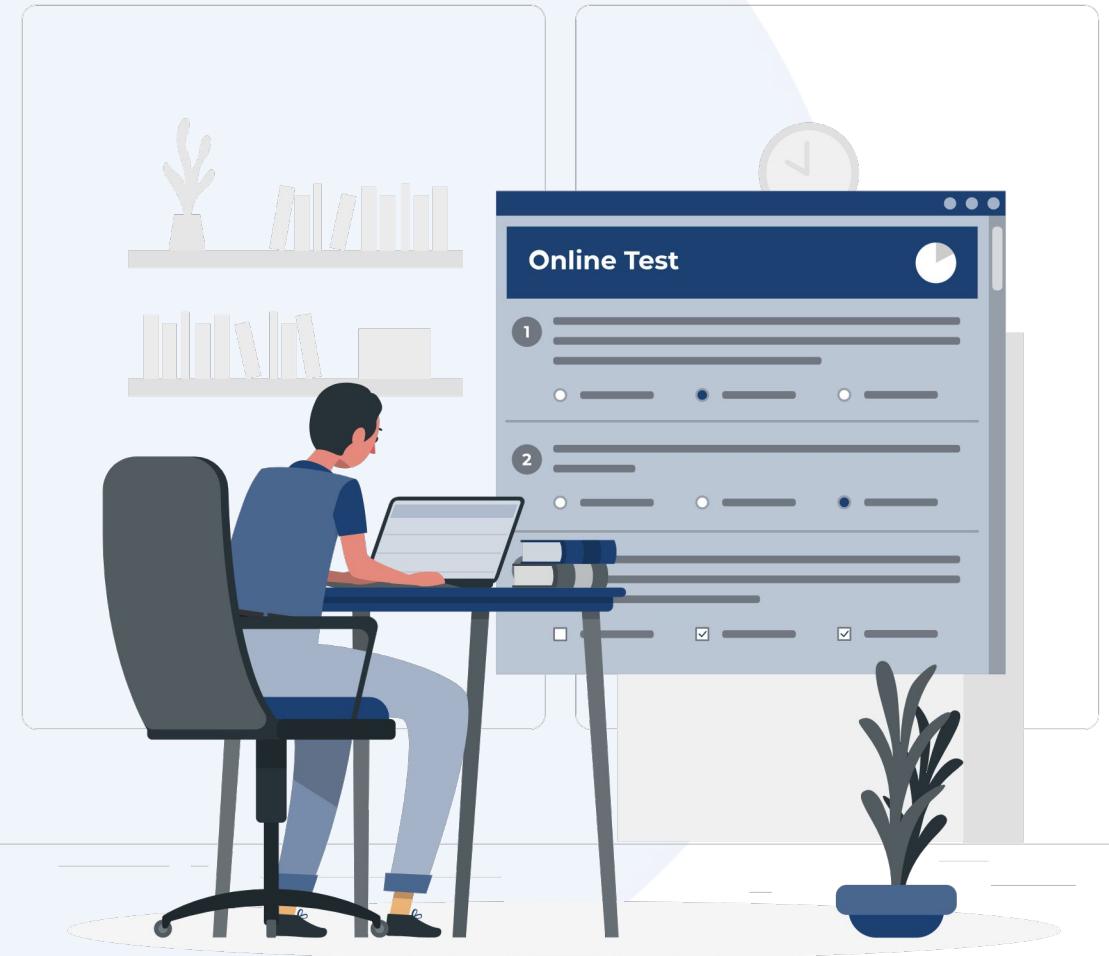
Graphic by: <https://storyset.com/online>

# Annual Recertification Process

Every year a recertification process is conducted for all users, except those with Read Only access, during the summer months. The recertification is meant to gauge whether users can successfully complete basic data entry tasks.

All users whose HMIS accounts were created before **January 1st** of the current calendar year are required to complete this process.

Users who fail to complete the recertification process by the end of the summer will have their HMIS accounts disabled. To reactivate their accounts, those users will need to complete the reactivation training course.



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

# RECAP: Managing Users

To successfully manage their users, agency admins should know how to:

- Onboard new users
- Determine training requirements
- Request CES access
- Reactive disabled accounts
- Plan for the annual recertification



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



# Best Practices for Submitting Tickets



# Ticket Submission Overview

Agency admins are the points of contact between 211OC and the rest of their agency. Whenever technical issues arise, agency admins should submit tickets to the Help Desk for assistance.

The Help Desk team strives to resolve most technical issues within three (3) business days, however more complex problems or tickets submitted without enough context may take more time to resolve.

Agency admins can submit tickets through their HappyFox accounts, or through our ticketing portal.



# Ticket Submission Categories

The Help Desk is split into two teams, the Support team and the Data team. The Support team manages most tickets while the Data team specializes in managing reports.

To ensure that tickets are routed to the correct team member, agency admins should select the most appropriate ticket category from the following list:

- Agency/Project Set-Up
- Client Record Merges
- Client Record Request
- Feedback
- HMIS Functionality Issues
- Reports
- Users and Trainings



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

# Providing Appropriate Ticket Context

When agency admins submit tickets to the Help Desk they should strive to include as much relevant information as possible.

Tickets submitted in response to technical difficulties encounters should include:

- Computer Terminal (Desktop, Laptop, Mobile)
- Operating System
- Web Browser

Tickets should also include information related to the user(s) encountering the issue, location of the issue and any troubleshooting methods already applied



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

# Ticket Submission - Examples



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

#HFI00044538

**Client Profiles (1)** just now

NEW

Hello, Client UID 04FE2918A and UID 8586CD2B8 are the same, please merge. Best, Agency Admin



raised by  
HappyFox Testing...

priority  
Medium

category  
HMIS Functionalit...

## Updates



HappyFox Testing 2...  
just now

Hello,

Client UID 04FE2918A and UID 8586CD2B8 are the same, please merge.

Best,  
Agency Admin



Other Recipients  
None

#HFI00044505

## Geolocation Issue (1) 2 minutes ago

NEW

Hello, User John Doe is not able to add a geolocation to the \_Housing Notes \_service item in our CoC Per



raised by  
HappyFox Testing...

priority  
Medium

category  
HMIS Functionalit...

## Updates

[Messages \(1\)](#)

[Attachments \(1\)](#)



HappyFox Testing 2...  
2 minutes ago



1

Hello,

User John Doe is not able to add a geolocation to the *Housing Notes* service item in our CoC Permanent Supportive Housing project. He is the only user experiencing this problem. He has tried clearing his browser cache and restarted his device, but the issue still persists.

Here are the device specifications:

- iPad (11th gen)
- iPadOS 26.0
- Safari Browser

I have attached an image of the error the appears whenever the user tries to add a geolocation.

Best,  
Agency Admin

issue\_example.png

# Client Identifying Information

Agency admins should never include Personal Protected Information (PPI), otherwise known as Personal Identifying Information (PII), in either the body of the ticket or in an attachment.

PPI/PII includes:

- Name
- Social Security Number
- Date of Birth

When referencing a client, agency admins must utilize the client UID

For more information on this topic, please reference our Sending Client Identifying Information to the HMIS Help Desk KB article



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

# Client Identifying Information - Examples



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

#HFI00044509

### Housing Move-In Date Error (1) a minute ago

CLOSED

Hello, Our agency is partnering with 211OC on the CoC Permanent Supportive Housing project. Our team is



raised by  
HappyFox Testing...

priority  
Medium

category  
HMIS Functionalit...

## Updates

[Messages \(1\)](#)

[Attachments \(1\)](#)



HappyFox Testing 2...  
a minute ago

1

Hello,

Our agency is partnering with 211OC on the CoC Permanent Supportive Housing project. Our team is reporting on the services component and 211OC is reporting on the housing component.

While reviewing our data we noticed that one of our clients, **Alejandro (UID 0C57A685A)**, has a housing move-in date prior to project start. How should we correct this error?

I've included a screengrab of the error in HMIS.

Best,  
Agency Admin

Screenshot 2026-04-17 160357.png

Other Recipients  
None

⚠ The Head of Household's 'Housing Move-In Date' entered is prior to their 'Program Start Date'. Please update as applicable.

## PROGRAM: COC FUNDED PERMANENT SUPPORTIVE HOUSING TRAINING PROJECT

**Enrollment** | History | Provide Services | Assessments | Goals | Notes | Files | Forms | [× Exit](#)

Enroll Program for client **Alejandro Vargas**

Project Start Date 08/10/2025 

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date 08/01/2025 

PRIOR LIVING SITUATION

**250** DAYS  
ACTIVE PROGRAM

Program Type:	Group (2)
Program Start Date:	08/10/2025
Assigned Staff:	Hugo Ambriz <input checked="" type="checkbox"/>
Head of Household:	<b>Alejandro Vargas</b> <input checked="" type="checkbox"/>

### Program Group Members

<b>Rodolfo Parra</b>	08/10/2025	<b>Active</b>
----------------------	------------	---------------

### Status Assessments

No Statuses

#CRM00044541

### Non-Duplicate Client Records (1) a minute ago

CLOSED

Hello, Recently our team received spreadsheet in our Dropbox folder about potential duplicate client rec

HT raised by  
HappyFox Testing...

priority  
Medium

category  
Client Record Mer...

## Updates

[Messages \(1\)](#) [Attachments \(1\)](#)

HT HappyFox Testing 2...  
a minute ago

1

Hello,

Recently our team received spreadsheet in our Dropbox folder about potential duplicate client records. After reviewing the document, I've identified a couple of client records that aren't duplicates but are listed as such. I've attached a copy of the updated spreadsheet below for your review.

Please advise on next steps.

Best,  
Agency Admin

Client\_Record\_Merges\_Review.xlsx

## Duplicated Client List

Personal ID	Unique ID	Name	Name DQ	SSN	SSN DQ	DOB	DOB DQ	Gender	Race and Ethnicity
0adba69e208a4aec81e47db319b1075b	A67A2159D	Simpson, Homer	Full name reported	***_**-0411	Approximate or	08/11/1986	Full DOB Reported	Man (Boy, if child)	White
	788E7F123	Simpson, Homer	Full name reported	***_**-0000	Client doesn't know	08/11/1975	Full DOB Reported	Man (Boy, if child)	White
0bb49b3ae5074a77af8f1a53987fab87	8278E88F1	Simpson, Marge	Full name reported	***_**-1104	Approximate or	08/11/1975	Full DOB Reported	Woman (Girl, if child)	White
	EF6DD169A	Simpson, Marge	Full name reported	***_**-0000	Approximate or	08/11/1975	Full DOB Reported	Woman (Girl, if child)	White
115784b263774633bb332ed0d05d8564	8D05F4E07	Weasley, Ginny	Full name reported	***_**-3333	Full SSN Reported	08/11/1975	Full DOB Reported	Woman (Girl, if child)	White
	BE703D690	Scam, Michael	Full name reported	***_**-3333	Full SSN Reported	08/11/1975	Full DOB Reported	Man (Boy, if child)	White
13789747b9fb4dc08040b8b58f83a372	91432E9E3	Potter, Harry	Full name reported	***_**-0000	Approximate or	07/20/1978	Full DOB Reported	Man (Boy, if child)	White
	88A5E0A7E	Potter, Harry	Full name reported	***_**-0000	Approximate or	07/20/1978	Full DOB Reported	Man (Boy, if child)	White
	F2B5E2CE2	Potter, Harry	Full name reported	***_**-0000	Approximate or	07/20/1978	Full DOB Reported	Man (Boy, if child)	White
	8F2B56986	Potter, Harry	Full name reported	***_**-0000	Approximate or	07/20/1978	Full DOB Reported	Man (Boy, if child)	Data not collected
1af6733f40e846d39f9f6f57dfe91291	D33081F34	Duck, Donald	Full name reported	***_**-0000	Approximate or	08/18/2001	Full DOB Reported	Man (Boy, if child)	Middle Eastern or N
	FC38D63AF	Duck, Donald	Full name reported	***_**-0000	Approximate or	02/05/2021	Full DOB Reported	Man (Boy, if child)	White
1c0e216152bb439881880475cca7f1e6	15205B234	Squarepants, Spongebob	Full name reported	***_**-0000	Approximate or	05/05/1980	Full DOB Reported	Man (Boy, if child)	White
	CDA2A1BA5	SquarePants, SpongeBob	Full name reported	***_**-0000	Approximate or	05/05/1984	Full DOB Reported	Man (Boy, if child)	White
373f57e9a4634586a75283f4d1b8a0d9	F4AB0B9ED	Doe, John	Full name reported	***_**-0000	Approximate or	05/05/1984	Full DOB Reported	Data not collected	Client doesn't know
Y	8F170413A	Disney, Mickey	Full name reported	***_**-0000	Approximate or	05/05/1984	Full DOB Reported	Man (Boy, if child)	White
	92AF2C4F9	Doe, John	Full name reported	***_**-XXXX	Approximate or	05/05/1984	Full DOB Reported	Man (Boy, if child)	Client doesn't know
	8DE94C5CB	Doe, John	Full name reported	***_**-XXXX	Approximate or	05/05/1984	Full DOB Reported	Man (Boy, if child)	White
3b97031c5cc54c67ba00c14be6513bb7	33547EE88	Brown, Charlie	Full name reported	***_**-2355	Full SSN Reported	05/05/1984	Full DOB Reported	Man (Boy, if child)	White
	290023F29	Brown, Charlie	Full name reported	***_**-2222	Full SSN Reported	05/05/1984	Full DOB Reported	Man (Boy, if child)	Data not collected
3bf819b8ccb24b24854d67980764ee2b	A3A0BB9E0	Mouse, Minnie	Full name reported	***_**-0000	Full SSN Reported	05/05/1994	Full DOB Reported	Woman (Girl, if child)	Data not collected
	7329DE0E5	Mouse, Minnie	Full name reported	***_**-0000	Approximate or	05/05/1994	Full DOB Reported	Woman (Girl, if child)	Client doesn't know

# Common Project Forms

Forms	Description
<a href="#">Agency/Project Set Up Form</a>	<p>Utilize to set-up a brand new project in HMIS.</p> <p>To ensure a quick set-up process, be sure to provide as much information as possible regarding funding and project type.</p>
<a href="#">Agency/Project Deactivation Form</a>	<p>Utilize when a project is no longer in operation.</p> <p>To facilitate a quick deactivation process, ensure that all clients are already exited-out of the project by running a <i>Program Roster Report</i>.</p>
<a href="#">Request to Update Bed Inventory Form</a>	<p>Utilize to add or remove bed inventory from a housing project.</p> <p>The household bed inventory types are: Households with Adults and Children, Households with only Adults and Households with only Children</p>
<a href="#">Request to Update or Add Funding to Existing Project Form</a>	<p>Utilize to add, modify or remove a project's associated funding.</p> <p>If funding needs to added or modified, include the new funding source, grant identifier(s) and funding start/end dates.</p>

# RECAP: Submitting Tickets

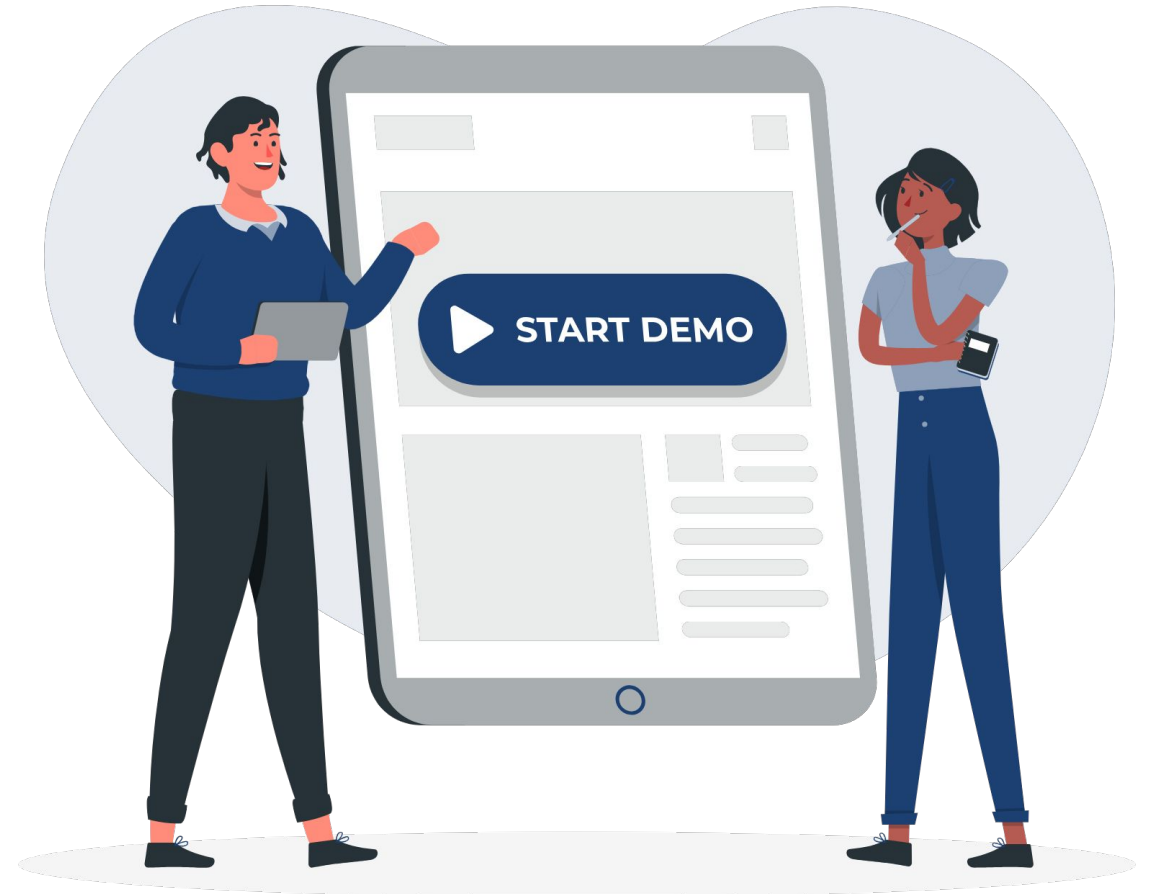
To communicate technical issues or request assistance from the Help Desk, agency admins should be able to:

- Identify ticket categories
- Provide appropriate context
- Refrain from including client PPI/PII
- Utilize common project forms



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

# Navigating the OC HMIS Website - Demo



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

# PART II

## Agency Administrators & Data Quality

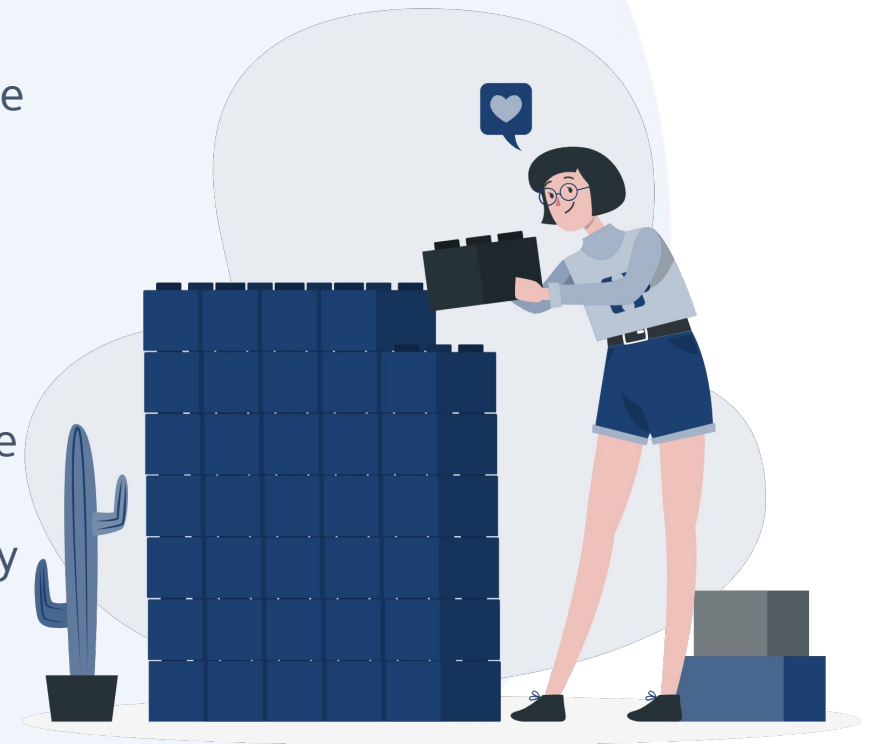


# The Real Impact of Data Quality

Each piece of data we enter into HMIS represents a real human being. Whether it's someone waiting for a safe place to sleep and a warm meal, a family of 5 about to move into an apartment, or a teen who'd rather sleep with strangers at a shelter than sleep one more night in an unsafe house. Our data also captures the summarized stories to potential funders who may not have the time to read the narrative section on your agency's website.

When our data is delayed or incomplete, there's an impact. The delayed exit for a shelter bed may mean one person doesn't have a safe place to sleep. Those missed Annual Assessments can mean the increase in income section on the report is significantly lower than in reality.

High quality data doesn't mean perfection, it means showing we care through small, intentional, and impactful shifts in how we see it's value.



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

# Component One - Timeliness

**Data Entry Timeliness:** the time between event occurrence and when it's recorded in HMIS. The OC HMIS community gives users **three calendar days** to enter the data into HMIS from the time the event occurred.

For example, if an intake for enrollment occurred on Friday 05/01/26 the information would need to be entered no later than 05/04/26.

**Important Takeaways :** Late data entry can result in:

- Missed or delayed shelter placements due to incorrect bed inventory
- Clients on cusp of age change fall outside of program eligibility. Think RHY or Senior programs.



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

# Component Two - Data Completeness

**Data Completeness:** the degree to which all required data is recorded into HMIS. These are mostly focused on the UDEs (Universal Data Elements) and PSDEs (Program Specific Data Elements).

**Important Takeaways** Incomplete data can result in:

- Veteran clients miss veteran-designated housing opportunities
- Incomplete reporting to funders. For example, a case manager forgot to update income for a client at program exit.



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

# Component Three - Accuracy

**Data Accuracy:** the degree to which data entered in HMIS represents the real information about the clients served.

**Important Takeaways** Inaccurate data can result in:

- Inaccurate Length of Homelessness recorded. LOH impacts priority on the Community Queue
- Clients miss a housing opportunity because the contact number was entered incorrectly.



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

# Component Four - Consistency

**Data Consistency:** the degree to which data is collected and entered uniformly by all staff that participate in HMIS.

**Important Takeaways:** Inconsistent data can result in:

Delayed services for clients. For example, one agency enters in a HMID (Housing Move-in Date) when a client has signed an agency-specific rental assistance agreement.

The other agency follows HUD guidance which states this is the date when the client physically sleeps in the unit.

If the client is requesting utility assistance services from another agency, they may be denied service since HMIS is not showing a HMID yet.



[Graphic by: https://storyset.com/online](https://storyset.com/online)

# Data Quality Report Cards - From Participating Agency 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												
	Longitudinal Systems Analysis (LSA)	October	December	January	April												
	Housing Inventory Count (HIC)	January	February	April	May												
	Sheltered Point in Time (PIT)	January	February	April	May												
Orange County Required Reports	Street Outreach Project Performance Reports	June, December	July, January	n/a	August, February												
	Emergency Shelter Project Performance Reports	May, November	June, December	n/a	July, January												
	Transitional Housing Project Performance Reports	April, October	May, November	n/a	June, December												
	Rapid Re-Housing Project Performance Reports	March, September	April, October	n/a	May, November												
	Homelessness Prevention Project Performance Reports	January, July	February, August	n/a	March, September												
	Permanent Supportive Housing/Other Permanent Housing Project Performance Reports	February, August	March, September	n/a	April, October												
	Data Quality Report Cards	January, April, July, October	January, April, July, October	n/a	February, May, August, November												

# Reports Overview

## Data Accuracy Dashboard

- DOB after project start
- Disabled w/o specified disability
- Specified disability(ies) w/o “yes” to disabled

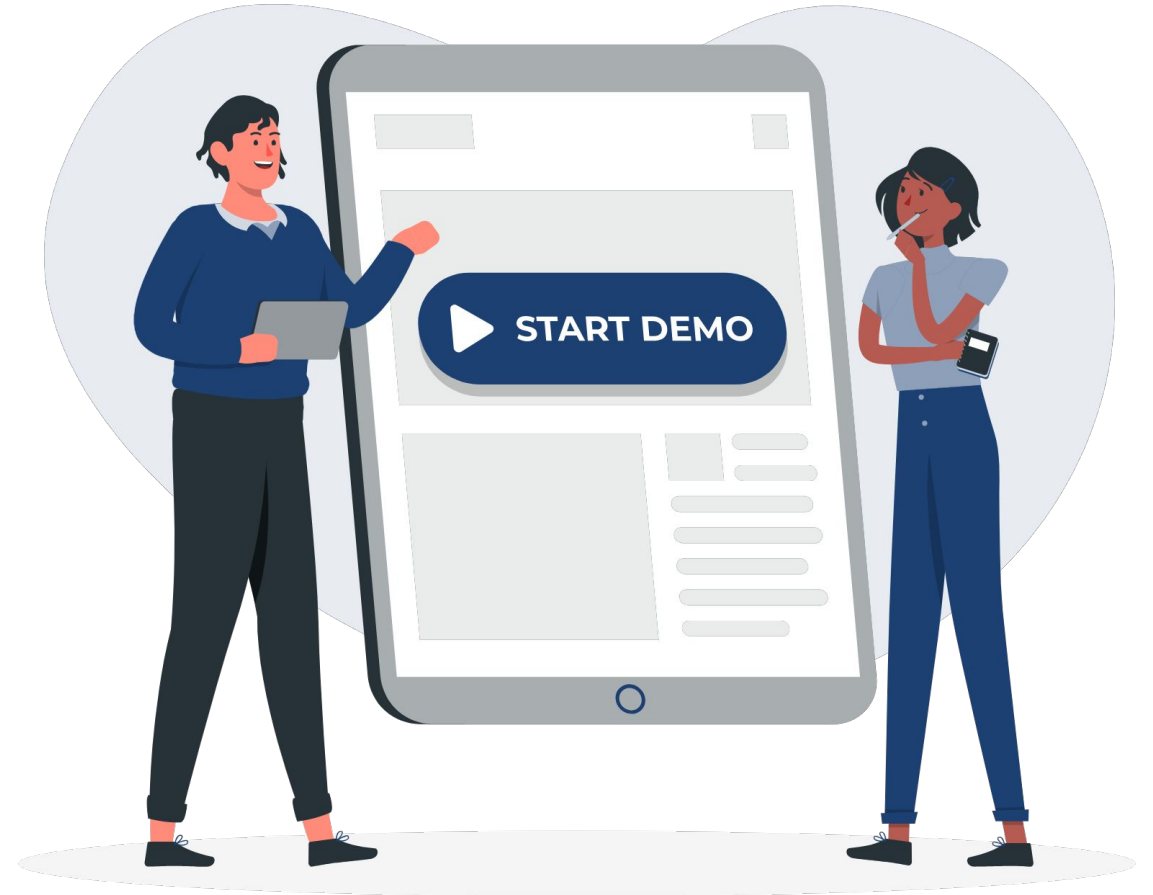
## LSA Data Cleanup - Household and Enrollment Data

- No Head of Household assigned
- Non Adult HoHs (in adult HH)
- HMIDs outside of enrollment

## LSA Data Cleanup Reports - Overlapping Enrollments

- RRH overlaps
- Emergency Shelter overlaps

# Demos for Data Reports



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

# 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 for joining us and  
have a great day!**





Orange County  
**UNITED WAY**