happy new year

Agency Admin. Meeting

Thursday, January 5th, 2023

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Getting To Know You

What was an unexpected Joy this past year?

Agenda

- CoC Updates

- UPLIFT Updates

- HMIS Newsletter

- A Year in Review

- LSA

- HIC/PIT

- Annual Privacy Training Recertification

- Reminders

- Next Month's Meeting

CoC|Coordinated Assessment Updates

CoC Updates

Volunteer Signup

Thank you for your interest. The 2023 PIT Count volunteer sign up is now available. **Please click this link and fill out a short survey to express your interest to volunteer.**

Training materials are available below. In person and virtual trainings will be scheduled starting in January leading up to the count.

- **Training Slides**
- **Training Video**
- **QR Code for App**

After signing up to volunteer, team leaders can **RESERVE CENSUS TRACTS to count using this link**. Please select 2-3 tracts to cover per day you wish to volunteer. Note some tracts are already reserved for outreach teams and advocate groups that specialize in those areas. If you feel your group specializes in a certain area that is already reserved, please contact ASR.

Hotspot Collaboration

A new strategy we are trying this year is to crowdsource potential hotspots for unsheltered people. If you would like to contribute please use the links below to add your sightings to a list. The first link will be for the general unsheltered population. The second will be for youths only.

Unsheltered Person Observations

Unsheltered Youth Observations   **https://osh.sccgov.org/2023-PIT**

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CoC| Coordinated Assessment Updates - *Upcoming Meetings*

Rapid Rehousing and Employment Initiatives Meeting
When: Thursday, January 12th and 26th, 2023
Time: 3:00pm-4:30pm
Where: Virtual Meeting

Service Providers Network Meeting
When: Wed, January 11th, 2023
Time: 9:30am – 11:00am
Where: Virtual Meeting

SCC TA Office Hours
When: Wednesday, January 25th, 2023
Time: 10:00am-11:00am
Where: **Zoom**

SCC CoC VI-SPDAT Training
When: Tuesday, January 31st, 2023
Time: 9:00am – 1:00pm
Where: Virtual Meeting

Coordinated Entry Work Group
When: Thursday, January 12th, 2023
Time: 1:00pm - 2:30pm
Where: Register Here!

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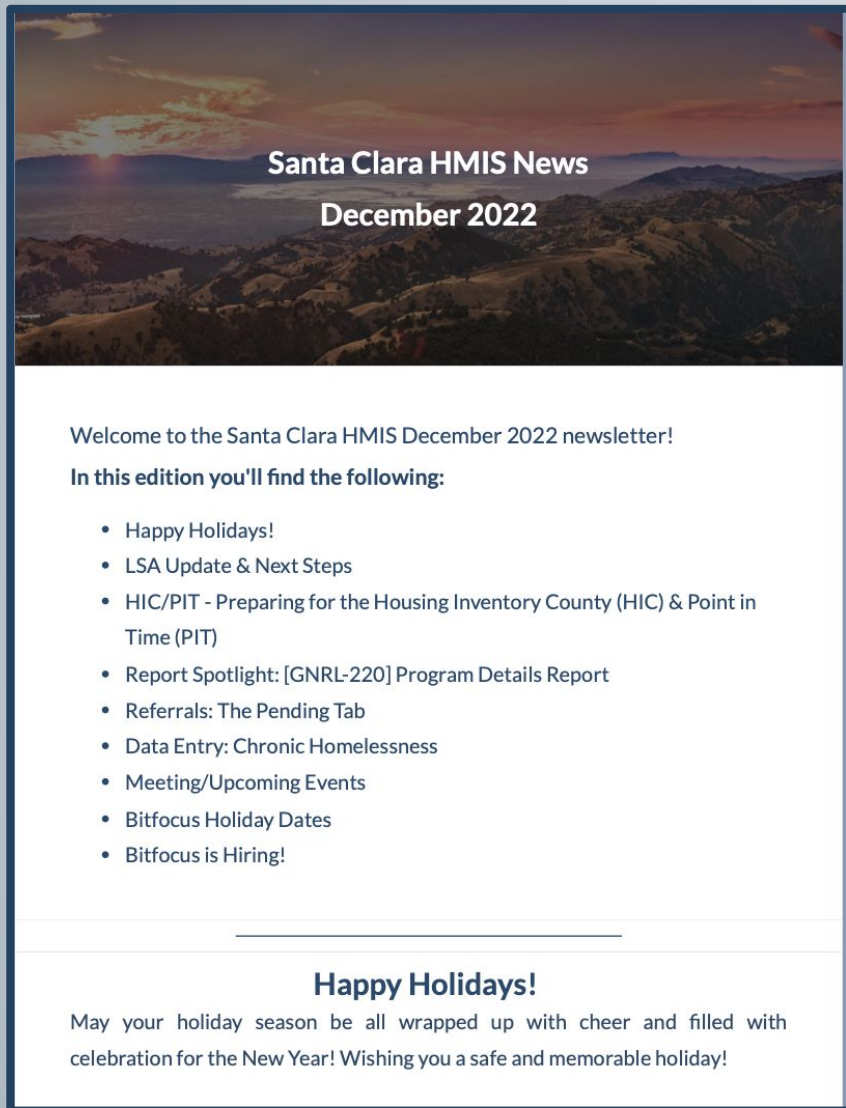
UPLIFT Updates

UPLIFT Updates

- We have issued about 65% of stickers for the January - March quarter

- The pooled pass period will begin on **February 1st**

- Replacement requests will be considered only after the start of the pooled pass period.

- There are two parts to making a replacement request:
  1. Send email to UPLIFT@hhs.sccgov.org explaining the reason for the replacement request
  2. Submit the request via a Status Update Assessment

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HMIS Newsletter

HMIS December 2022 Newsletter

Santa Clara HMIS News

December 2022

Welcome to the Santa Clara HMIS December 2022 newsletter!

In this edition you'll find the following:

- Happy Holidays!
- LSA Update & Next Steps
- HIC/PIT - Preparing for the Housing Inventory County (HIC) & Point in Time (PIT)
- Report Spotlight: [GNRL-220] Program Details Report
- Referrals: The Pending Tab
- Data Entry: Chronic Homelessness
- Meeting/Upcoming Events
- Bitfocus Holiday Dates
- Bitfocus is Hiring!

Happy Holidays!

May your holiday season be all wrapped up with cheer and filled with celebration for the New Year! Wishing you a safe and memorable holiday!

Check out last months Newsletter and other newsletters here!

A Year in Review

A Year in Review - *Accomplishments*

January

Different Colors for Clarity Live Site and Training Site
To assist users in visually distinguishing between Clarity Human Service site types, we have implemented color schemes for each instance type. Production sites will keep their current color, but the header and login side panel will now be blue for training sites and green for migration sites.

Reopen Program Button
This update introduced a Reopen Client Program button on the client Program Exit screen that allows you to reopen a Program enrollment for a client.

Referral History Tooltips
In the History section of Referrals, you can now hover over a referral event to display a tooltip that identifies the item.

NHSDC Presentation on Here4You Hotline program

February

Currently Enrolled Label
We have updated the Include group members list that allows you to select members of a client's household to include in an enrollment for that client. The system will now display a Currently Enrolled label for other household members who are actively enrolled in the same Program (i.e., there is no enrollment end date, or the end date is after today).

Aging into Adulthood Banner
This is an additional update to the "Aging into Adulthood" warning banner implemented within the 2022 Data Standards update.

Well Being Questions
These questions were added as part of the revised data standards.

HIC/PIT
Completed 2022 Housing Inventory & Point In Time Count

March

SCC Client Portal went Live!

ROI (Release of Information) - Electronic Signatures released

Reviewed 2022 User Satisfaction Survey

Completed Data Engagement Workshop: All Things Client Related!

May

Help Center Email
We have updated the Help Center link in all emails sent by the system from get.clarityhs.help to help.bitfocus.com.

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A Year in Review - *Accomplishments*

June

Data Engagement Workshop: Navigating the HMIS Report Library & Data Analysis 101

August

Housing Move-in Date Warning Banner

Before this update, the system displayed a warning banner when any household member's Housing Move-In Date was not on or between the Project Start Date and Project Exit Date. To better align with HUD logic, the system will now only display the banner when the Head of Household's Housing Move-In Date is not on or between the Project Start Date and Project Exit Date.

Referral Link Display

If a referral that is connected to a program is deleted, the system will no longer show the referral connection icon for that program on the client's HISTORY page.

September

Direct Funding Source Options

Programs can map funding sources specifically to a service

CE Workflow Implemented!

Addition of the Administration Only/CET CQ
Direct Referral CQ

CE Assessor Training

This training covered the changes to the CQ and provides guidance for Assessors on these changes

Data Engagement Workshop: Navigating the HMIS Report Library & Data Analysis 201

October

UPLIFT Updates

New process for replacing lost/stolen badges and/or stickers

Interim VI-SPDAT launched

Interim VI-SPDAT Training

This training covered the changes to the VI-SPDAT and assessment process

Housing Problem Solving launched

HPS expanded from the Here4You hotline to a set of shelter providers

November

CE Events Change

The upcoming changes will allow set-up of CE events that is different from the usual "services" setup which inferred it was a CE service type

Federal Reporting LSA

Federal Reporting - *LSA Due Wednesday, January 11th*

- If you have received an email from us requesting ***Data Clean-up or Explanations*** for

  Utilization or LOS please respond ASAP

- We will be doing a final submission on Monday, **January 9th, 2023**

- Any final warning that we receive from HUD that require your guidance will be expected to

  have a same-day turnaround response - <mark>*please be diligent with your emails*</mark>

- If you have any questions, please be sure and contact the Help Desk

  (sccsupport@bitfocus.com or the Sys. Admin. Team (scc-admin@support@bitfocus.com)

  ASAP

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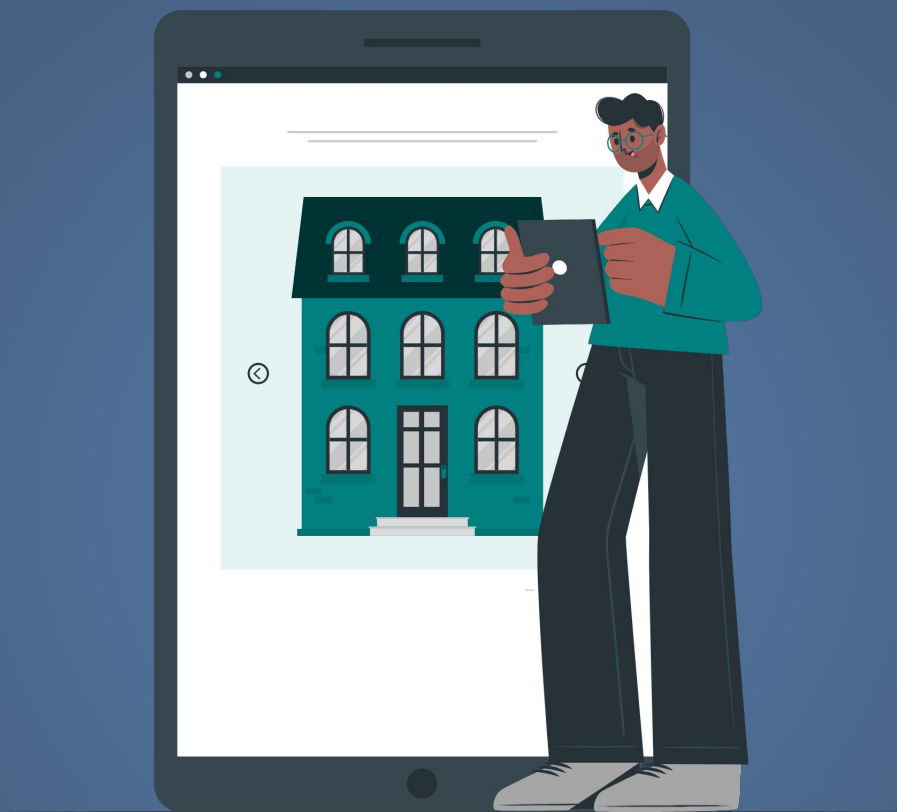
Federal Reporting HIC/PIT

HIC/PIT - *January 24th & 25th,2023*

- **What is the Point-in-Time Count?**

The Point-in-Time (PIT) count is a count of sheltered and unsheltered people experiencing homelessness on a single night in January. HUD requires that Continuums of Care conduct an annual count of people experiencing homelessness who are sheltered in emergency shelter, transitional housing, and Safe Havens on a single night. Continuums of Care also must conduct a count of unsheltered people experiencing homelessness every other year. Each count is planned, coordinated, and carried out locally.

- **Why does the Point-in-Time Count matter?**

Point-in-Time Count data are the primary data used for federal funding allocations and national estimates of homelessness. The numbers reported by your community are used by the US Interagency Council on Homelessness and all federal departments including Housing and Education. PIT Count numbers are also most often cited by local strategic plans, state, county and city government and the media.

Any questions? Please contact:

Peter Connery, *Applied Survey Research*
connery@appliedsurveyresearch.org

Leila Qureishi, *County of Santa Clara Office of Supportive Housing*
leila.qureishi@hhs.sccgov.org

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HIC/PIT - *January 24th & 25th, 2023*

Report is on shelter and housing programs (ES, TH, RRH, PSH), including non-participating HMIS programs (e.g. DV programs) and includes:

- Bed/unit capacity
- Federal funding source
- HMIS participation
- Location (geocode and address)
- Other project details
- Utilization rate based on clients in shelter/housing during one night in January (point-in-time count)

Run and review the **[GNRL-220] Program Details Report** to help identify any issues and/or changes that need to be made regarding any of the items listed above and let us know

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HIC/PIT - *January 24th & 25th, 2023*

- All Shelter and Housing projects will need to report the actual number of clients served on one night in January. Information will be used to calculate Utilization Rates for each project.
  - PSH, RRH, and OPH (Other Permanent Housing) Projects will be based on clients housed
  - RRH bed/unit inventory will be based on housed clients
- How you can prepare
  - Run the **[GNRL-106] Program Roster** and review the list of active clients
    - Exit clients who are no longer in the project
    - Enroll clients who are not yet in HMIS
  - RRH and PSH projects - Fill out the Housing Move-In Date for your housed clients
    - Housing Move-In Date should always be on or after the Project Start Date (if the client was housed at entry, use the Project Start Date)

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HIC/PIT - *Point in Time Count*

- The Point In Time (PIT) Count is conducted annually in late January, on the same day as the HIC

- The report includes sheltered clients (ES, TH, Safe Haven), including clients in non-participating HMIS programs (e.g. DV programs)

- Number of households and clients served the night of the PIT

- Number of children, adults aged 18-24, adults over 24

- Race, Ethnicity, Gender, Chronic Homelessness

- Substance Abuse, Mental Illness, DV, HIV/AIDS

- Information is broken out by both household type as well as specific demographics (Veterans, Parenting Youth, Unaccompanied Youth)

HIC/PIT - *Bed & Unit Inventory*

- **Inventory information** - Please do a final review and confirm the information about housing & shelter programs

- Let us know if any new housing or shelter programs have come online during calendar year 2022

- Similarly, let us know if any programs at your Agency have stopped operating during calendar 2022

- **Client data** - Make sure the household and client counts are accurate for the night of *Tuesday, January 24th, 2023*

- The number of households/clients in your programs in HMIS match the number of households/clients that were actually there on that date (1/24/2023)

    - **For ES/TH** - Review demographic information

    - **For RRH/PSH** - Fill out the Housing Move-In Date for your housed clients
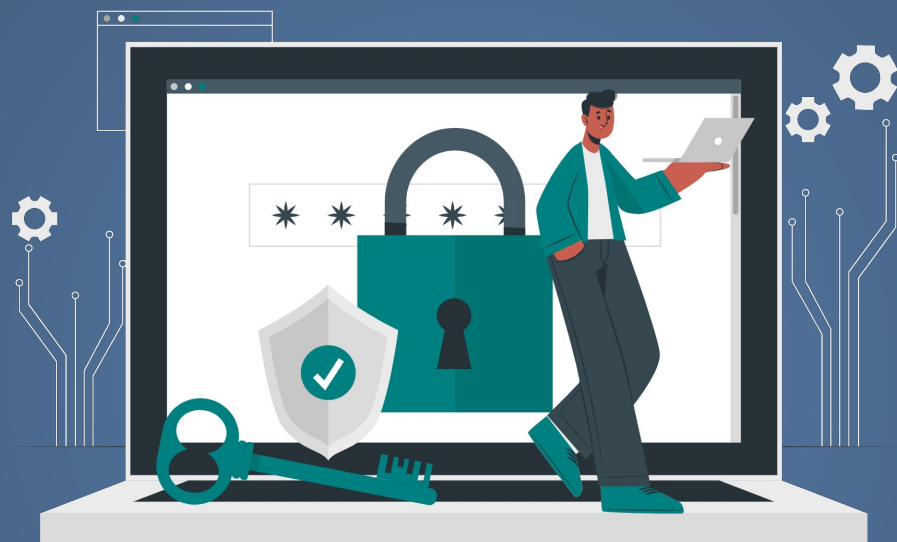
Annual Privacy Certification - *Next Steps*

Annual Privacy Certification 2023- *Upcoming!*

Timeline

✓ Training recertification commence date to be determined *(Likely in January)*

    ○ A separate email will go out with the link to the training

✓ Deadline to complete the training **TBD**

What You Need To Do

✓ Let staff know they will need to recertify

✓ Provide staff with at least 20 minutes to complete training

✓ Ensure staff know they must score 80% or higher to be considered "passing"

✓ *Staff that do not complete training by deadline will have their HMIS access revoked until completion and passing of training*

✓ It is the staffs responsibility to contact the <u>Help Desk</u> after completion of training; if access is revoked (to have access reinstated)

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Reminders

Reminder - *Security Checklist Due, Friday, February 3rd, 2023*

Appendix B: Quarterly Compliance Checklist

SANTA CLARA COUNTY HMIS QUARTERLY COMPLIANCE CERTIFICATION CHECKLIST	☐ Quarter 1	HMIS Partner Agency Name :	
	☐ Quarter 2		
	☐ Quarter 3	Security Officer Name:	
	☐ Quarter 4	Date:	

Workstation Security Standards

In partnership with Santa Clara County, Clarity Human Services Software, a division of Bitfocus, Inc., administers the County's Homeless Management Information System ("HMIS"), a shared database software application which confidentially collects, uses, and releases client-level information related to homelessness in the County. Client information is collected in the HMIS and released to nonprofit housing and services providers (each, a "Partner Agency," and collectively, the "Partner Agencies"), which use the information to improve housing and services quality. Partner Agencies may also use client information to identify patterns and monitor trends over time; to conduct needs assessments and prioritize services for certain homeless and low-income subpopulations; to enhance inter-agency coordination; and to monitor and report on the quality of housing and services. This Compliance Certification Checklist is to be completed and certified quarterly by the Partner Agency Security Officer for the HMIS Partner Agency named above according to the schedule outlined below. Each Agency workstation used for HMIS data collection, data entry, or reporting must be certified compliant. Any identified compliance issues must be resolved within thirty (30) days. Upon completion, the original signed copy of this checklist should be retained in the records of the HMIS Partner Agency named above for a minimum of seven (7) years. Additionally, a copy should be made available the SCC Bitfocus System Administration team (the "Lead Security Officer") at Clarity Human Services Software, a division of Bitfocus, Inc.

Compliance Certification Schedule:
- Quarter 1 (due by April 30th):   New HMIS users or workstations created in Q1 (Jan-Mar)
- Quarter 2 (due by July 31st):   New HMIS users or workstations created in Q2 (Apr-June)
- Quarter 3 (due by October 31st):   New HMIS users or workstations created in Q3 (July-Sep)
- Quarter 4 (due by January 31st):   ALL Active HMIS Users and Workstations

✓ Checklist is due for **ALL STAFF** added during the 2022 year - January through December

✓ You will receive a list of new staff for you to complete verification for by next week

✓ Self Certification Forms **are not** to be submitted to us; *please retain for your records*

✓ If you do not submit your certification form ALL STAFF at your agency will loose HMIS access until it is submitted

✓ DUE DATE: Friday, February 3rd, 2023

Reminder - *Clarity Human Services Help Center*
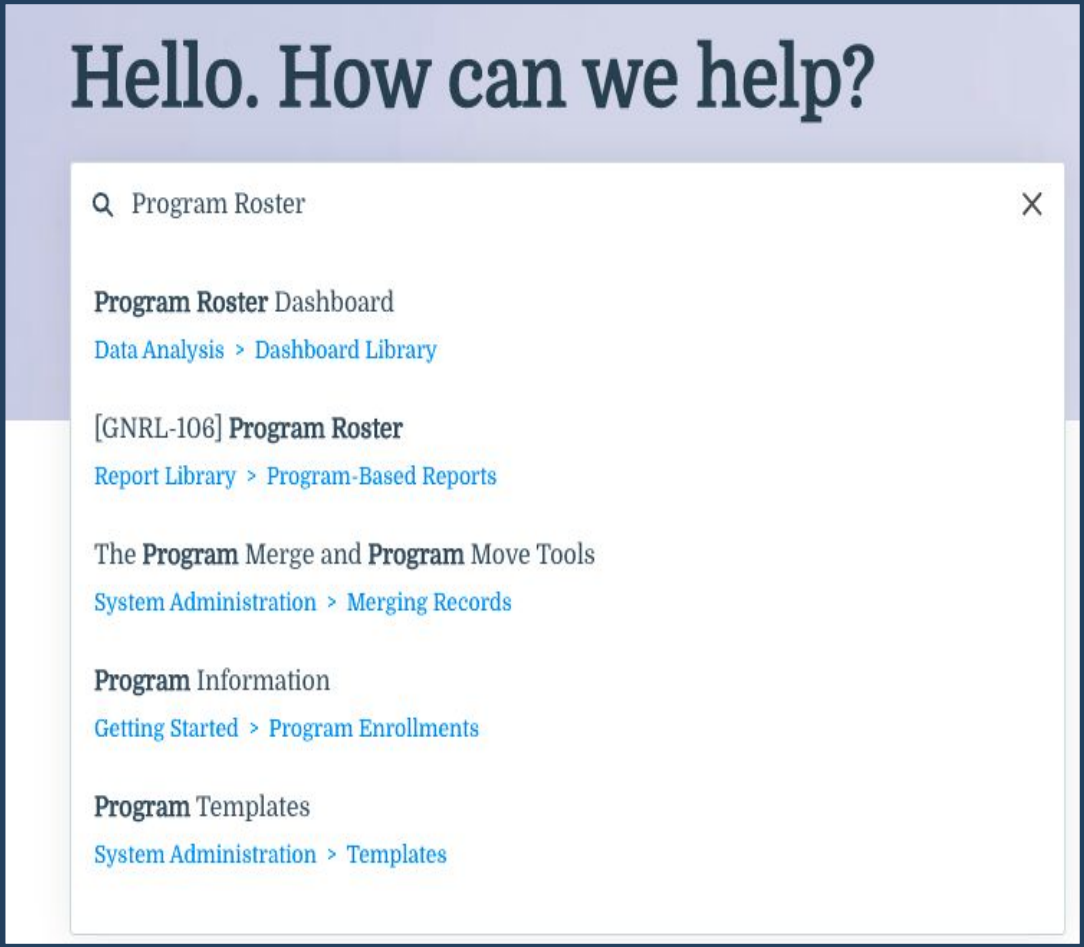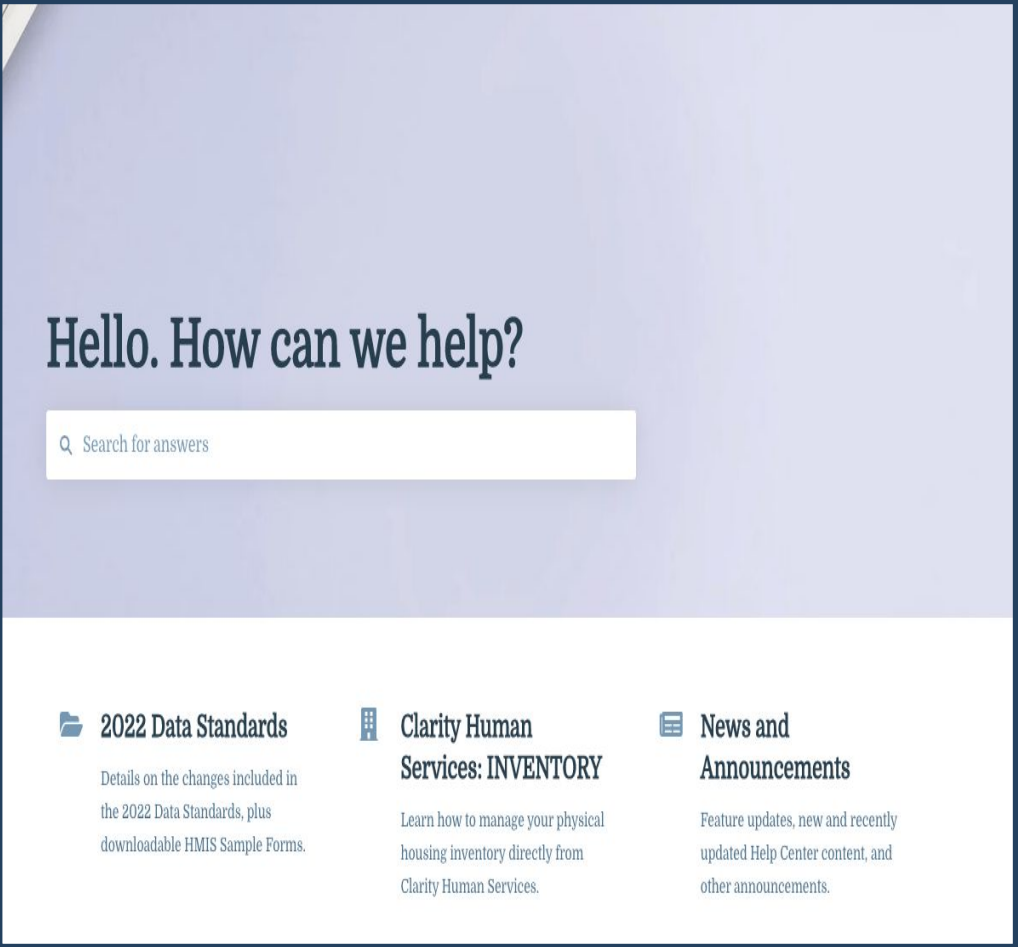
Link to page embedded in image!

Reminder - *Clarity Training Opportunities*

Link to page embedded in image!
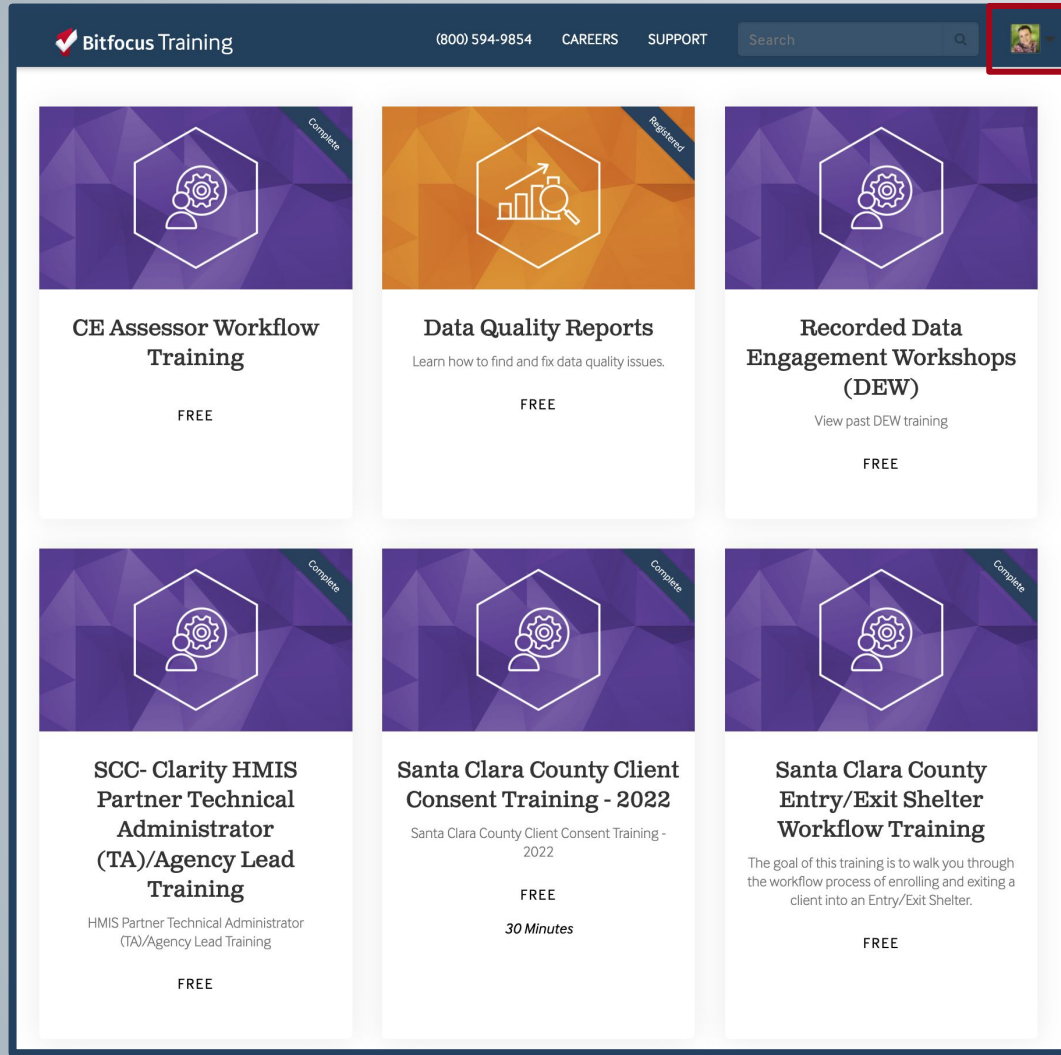
You must log in to access the trainings here

- Multiple Training Opportunities and Refreshers
- Select the training you want to watch
- Don't have enough time to watch it all - pick up next time where you left off
- Have issues accessing? Let us know

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Reminder - *End User Resource Document*

HMIS End User Resource Document

As an HMIS End User there are many resources available to assist in navigating HMIS. This document provides a shortcut to where these resources can be found.

Accessing HMIS
Requirements for a log in to conduct data entry

1 Online Clarity General Training (*prerequisite for account creation*)

2 Pre-recorded SCC HMIS Client Consent Training (*prerequisite for account creation and is required on an annual basis*)

3 Live SCC VI-SPDAT Training* hosted by SCC. Please note this training is required if you will be administering the VI-SPDAT assessment at your agency

UPLIFT Training is available for all users who request UPLIFT transit passes for their clients. UPLIFT training is mandatory. Users must complete training before they will be authorized to request UPLIFT passes - **UPLIFT Training page**

Newsletters
Be in the know of changes to HMIS or new policies around data entry, data standards and reporting here!

Forms & Manuals
Here you can find all the different forms used for data entry to HMIS from client forms to assessments.

Translated Forms & Other Tools
References here!

User Account Management
Modification Requests: If you require a new access role, complete any required training and connect with your Agency Lead to approve the change and request. Have your Agency Lead then contact the Help Desk at sccsupport@bitfocus.com

1 Your email is NOT your User Name! If you are uncertain of what that is, connect with the Community Admin (scc-admin@bitfocus.com) team or contact the Help Desk to find out. If you have not used Clarity HMIS in 90 or more days, your account will be inactive due to SCC OSH's auto-deactivation policy. Connect with the Bitfocus help desk to reactivate your account.

2 If it has been more than a year, you will have to retake the Clarity Human Services General Training in addition to the request.

3 Reactivated user accounts must be logged within 24-hours of reactivation, or they will automatically revert back to the deactivated status. **Log in to HMIS** here!

Clarity Human Services FAQ Training
We're excited to offer this FAQ course! Our sole intent in offering this course is to get you answers quickly, efficiently, and in a way that is easy to learn. Here we answer questions that would typically result in a ticket through our Help Desk. We find that offering these resources ad hoc gives our users the ability to find answers quickly.

Have Questions?
Check out these resources available to you.

Bifocus Clarity Human Services Help Center
How can we help? Check out all the resources here!

Help Desk: sccsupport@bitfocus.com
Phone Number: (408) 596.5866 Ext. 2
Sys. Admin. Team: scc-admin@bitfocus.com

Virtual Suggestion Box!
Want to share something or make a request? Here is where to do it! *And it's anonymous.*

Link to Resource embedded in image!

Check out our latest addition to Resources for End Users!

It's a one STOP shop for all items End User related

Please be sure and share this practical and easy to use resource!

Reminders - Test Clients

- Please **do not enter TEST CLIENTS** into the live instance

- **Test clients will be deleted during data quality clean-up**

- Use the SCC Training Site to do testing

- If you do enter a test client, please be sure to remove them

This will avoid Federal Reporting Data Quality issues

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Reminders - SCC HMIS Training Site

Want to Hone Your Skills? Use the SCC HMIS Training Site
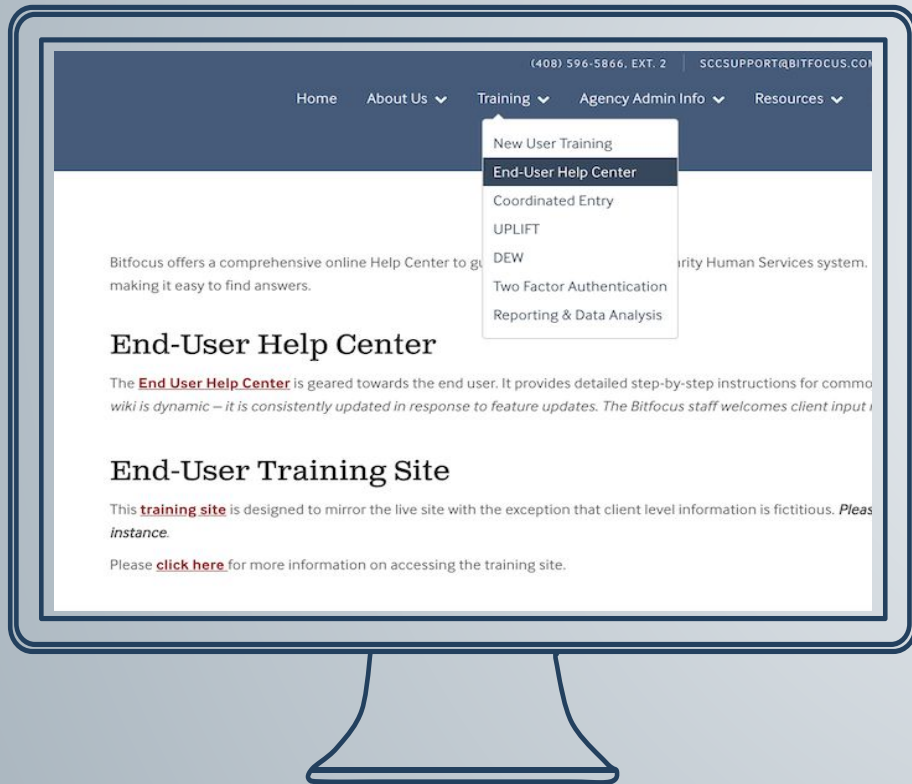
What you need to know:

➢ From the Training Tab select the **End-User Help Center drop down**

➢ **Scroll to the End-User Training Site**

➢ Contact the Help Desk to gain access at *sccsupport@bitfocus.com*

➢ You should complete all required training as usual

➢ Practice entering client information and uploading docs. in an agency/program set-up to mirror your current agencies set-up in the live HMIS website

Reminders - *Office Hours*
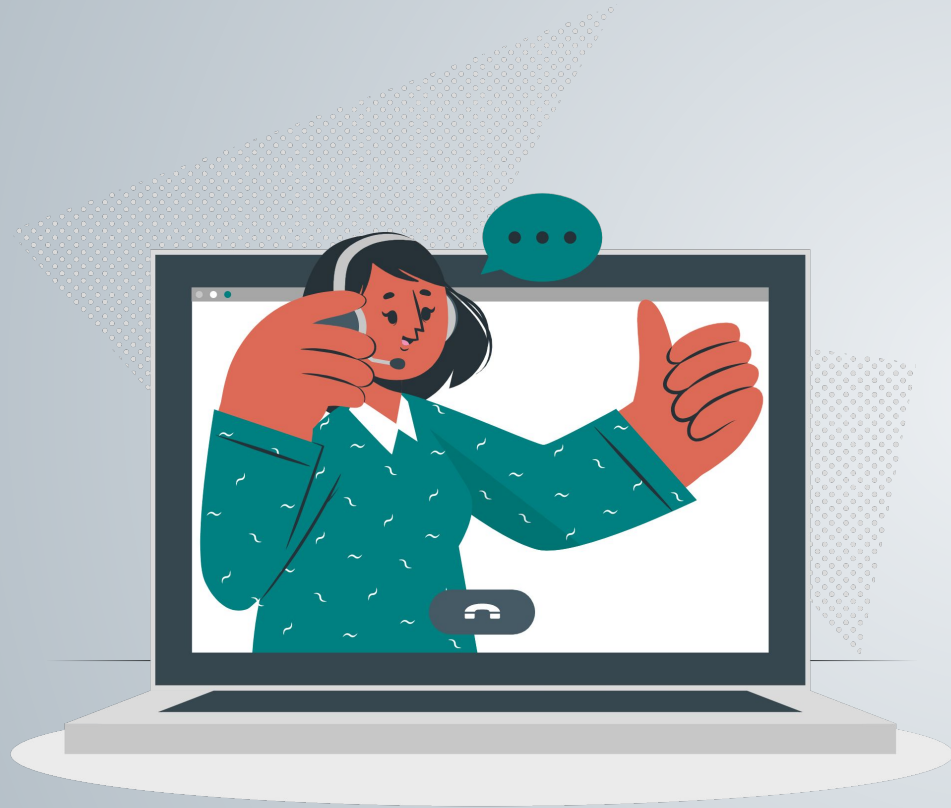
Have questions about HMIS or Looker?

Join us and get these questions resolved!

Clarity Office Hours
When: Bi-weekly, Thursday
Time: 10:00am - 11:30am

Looker Office Hours
When: Bi-weekly, Monday
Time: 2:00pm - 3:00pm

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Reminders - *Using the Help Desk*

We are still receiving a lot of requests directly, please utilize the Help Desk as much as possible. They will loop us in if and when necessary.

When requesting the following please be sure and contact the Help Desk:

1. End User Access

2. Update a users access after completion of the VI-SPDAT/HPAT required training

3. Verifying an end user has completed required training

4. When an end user has separated from your agency (make inactive)

5. Access to the SCC HMIS Training Instance/Sandbox

6. General Assistance with reporting

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Next Month's Meeting
Thursday, February 2nd, 2023