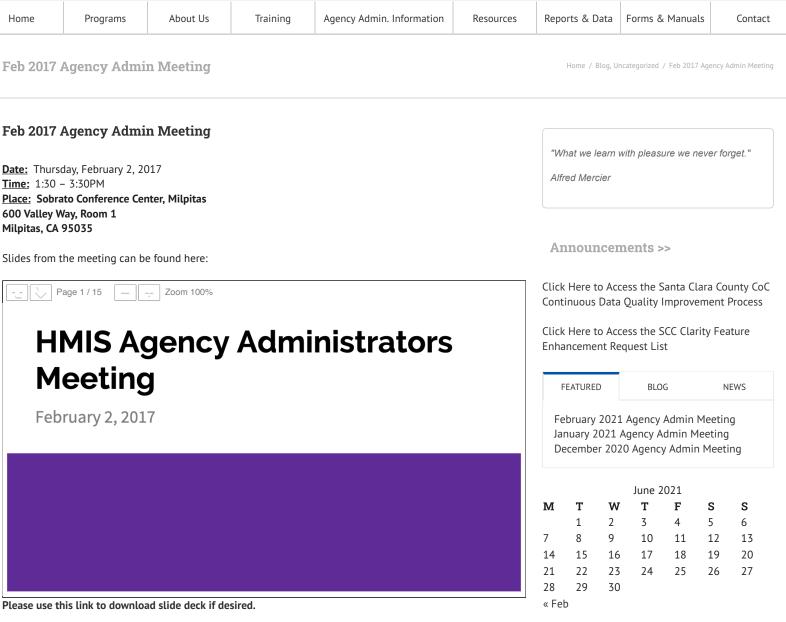




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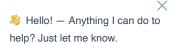


#### <u>Agenda</u>

- 1. UPLIFT Trainings upcoming
- 2. Useful reports (library and Looker)
  - 1. Review Community Capacity Report
  - 2. ES/TH and RRH Utilization Report
  - 3. Helpful Looker Tips
- 3. User Login Review thank you!
- 4. New form and process to set up new programs in HMIS
- 5. New APR coming soon
- 6. Release of Information form
- 7. CDQI Items

# **UPLIFT**

- 1. UPLIFT's one year anniversary in Clarity is coming soon
- 2. Another round of in-person trainings will be available:
  - 1. Fri, Mar 3, 1:30-3pm
  - 2. Mon, Mar 6, 1:30-3pm
  - 3. Both trainings at Charcot Training Center
- 3. Trainings will cover data entry requirements for UPLIFT
- 4. Current users and new users are welcome
- 5. The video training is still available on scc.hmis.cc if you can't make the in-person training (when using this option, please fill out the Certification of Completion!)



#### **Useful Reports**

Community Capacity Report

- 1. Providing place to view current capacity of the system (Emergency Shelter, Transitional Housing, Rapid Rehousing, Permanent Supportive Housing programs)
- 2. Includes information from 2015, 2016, 2017
- 3. Tracking for Housing 6000 initiative
- 4. Numbers come from HMIS. Please make sure bed/unit inventory in HMIS is accurate. *Let Leila at OSH know if there are changes to inventory/capacity.*
- 5. Regularly need to report capacity and utilization to HUD. Bitfocus usually verifies information with agencies, but we encourage agencies to let us know when bed/unit numbers have changed.

# ES/TH Utilization Report

- 1. Leila from OSH runs report monthly and ask agencies to review (at some point, these reports will be run without asking agencies to verify the data)
- 2. The report is available in the Report Library, Agency Specific reports folder ([SCC-107] ES/TH Utilization Report)
- 3. For ES, TH, Cold Weather/Seasonal programs
- 4. Includes information on number of clients served, capacity (bed/unit inventory), utilization rates 5. Report features:
  - 1. Sections on Point-In-Time (on last day of the report period) and Utilization Over Report Period
  - 2. Breaks down information by Program Type and Individual Program
  - 3. Shows any changes in inventory over time

# **RRH Utilization Report**

- 1. OSH runs this regularly for RRH programs (at some point, these reports will be run without asking agencies to verify the data)
- 2. The report is available in the Report Library, Agency Specific reports folder ([SCC-106] RRH Utilization Report)
- 3. The report uses RRH specific questions (Residential Move-In Date, Transition In Place). Please make sure that information is entered in Clarity!
- 4. Includes information on number households served, capacity, utilization rate, number housed, number who exited and transitioned in place/dis-enrolled
- 5. Report features
  - 1. Sections on Point-In-Time (on last day of the report period) and Utilization Over Report Period
  - 2. Calculates capacity based on an annual capacity that you can input

*Important!* – At some point, live data from Clarity will be pulled into dashboards that the community can view

# Looker Tips - Visualizations

# 1. General

- 1. Open visualization tab
- 2. Choose visualization type (e.g. chart)
  - Looker.com has more information about specific visualization types (see slide deck for exact URL)
- 3. Adjust visualization settings

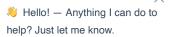
# 2. Example

- 1. Add Veteran Status as a column
- 2. Add Number of Clients as a column
- 3. Click Visualization and choose type (e.g. bar graph, pie chart)
  - 1. Needs Measure to run (the orange options, in this case Number of Clients is used)
- 4. Choose "Donut Multiples" will get message that a pivot is required
- 5. Click "Pivot" button next to Agency Name (Visualization should update)
- 3. Can take a screenshot to copy visualizations

# <u> User Login Review – thank you!</u>

- 1. In January, Bitfocus asked agencies to review user accounts
- 2. Agencies were very responsive
- 3. Deactivated about 60 accounts (for users who no longer needed access)
- 4. Thanks everyone for your help!

#### New form and process to set up new programs in HMIS



- 1. When first setting up programs in Clarity, Bitfocus asked agencies to provide information for program set-up using a Google spreadsheet
- 2. Now, agencies normally email to request a new program
- 3. Challenges
  - 1. Some information not included in request (e.g. did not know program would be part of CCP, funding source not provided, program for Veterans but not marked as a Veteran program)
  - 2. Programs may not be set up correctly and required information may not be collected
- 4. New process proposed new form to request new program. OSH manager and CoC lead (Hilary)
  - will approve set-up of new program before change is made in Clarity.
    - 1. Collect all information needed
    - Can keep OSH informed (and OSH can help clarify program set-up requirements where needed)
- 5. Feedback on new process
  - 1. No objections
  - 2. Have announcements about program changes at Agency Admin meetings
- 6. Other processes that will need approval:
  - 1. Deactivation of programs
  - 2. Changes to inventory

# New APR coming soon

- 1. New APR format coming soon
- 2. New database system will be used for the APR (called Sage)
- 3. Starting April 1, Sage will be used to submit APRs. Until then, continue to use esnaps.
- New APR will be in csv format, which will be uploaded into Sage. No need to type in every number into Sage.
- 5. If your APR is due around April 1, HUD advised you may want to ask for an extension if you are submitting using Sage in case of technical difficulties
- 6. More information about Sage (including training, logins, etc) will be released by HUD
- 7. New APR will be available in Clarity before April 1
- 8. Old APR will still be available in Clarity if you want to run it

#### Release of Information form

- 1. Review do's and don'ts for ROI
- 2. Don't
  - 1. Edit/alter the ROI the format of the document is intentional
  - Enter information that the client did not consent to share (e.g. if client does not consent to share medical history, VI-SPDAT questions about medical history cannot be filled out. If this is found, the VI-SPDAT will be deleted.)
  - 3. Use the old ServicePoint/CTA ROI

#### 3. Do

- 1. Check to see if client has valid ROI before entering data
- 2. Make sure ROI is fully completed, signed, dated
- If ROI is already uploaded, review it to make sure you are aware of what is ok/not ok to enter
- 4. More sure you have correct version of ROI form
- 4. Bitfocus checks ROI and may suspend users if there are violations
- 5. Questions
  - 1. Spanish version is not yet available, but OSH is working on it
  - 2. How to know if ROI is expiring there will be a warning banner, you can view the ROI in Clarity

#### CDQI Items

- 1. Thank you to agencies that have responded!
- 2. A handful of agencies have not yet responded please take a look at the spreadsheet (the link is
- in the email announcement about the Agency Admin meeting)
- 3. Federal deadline in April

By Jenn Ong | February 2nd, 2017 | Blog, Uncategorized | Comments Off on Feb 2017 Agency Admin Meeting

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