Feb 2017 Agency Admin Meeting

Date: Thursday, February 2, 2017
Time: 1:30 – 3:30PM
Place: **Sobrato Conference Center, Milpitas**
600 Valley Way, Room 1
Milpitas, CA 95035

Slides from the meeting can be found here:

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HMIS Agency Administrators Meeting

February 2, 2017

Please use this link to download slide deck if desired.

Agenda

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!)

"What we learn with pleasure we never forget."

Alfred Mercier

Announcements >>

Click Here to Access the Santa Clara County CoC Continuous Data Quality Improvement Process

Click Here to Access the SCC Clarity Feature Enhancement Request List

FEATURED | BLOG | NEWS

February 2021 Agency Admin Meeting
January 2021 Agency Admin Meeting
December 2020 Agency Admin Meeting

June 2021

M	T	W	T	F	S	S
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7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

« Feb

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)
        1. 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

User Login Review – thank you!

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
    2. 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.
4. 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
    2. 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
    3. 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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Comments are closed.

OUR VISION: No one lives outside.

We are dedicated to removing barriers and providing affordable housing to ensure the economic self-sufficiency of all persons in Santa Clara County.

Homelessness ends when everyone has a home.