Agency Admin. Meeting

Thursday, March 2nd, 2023

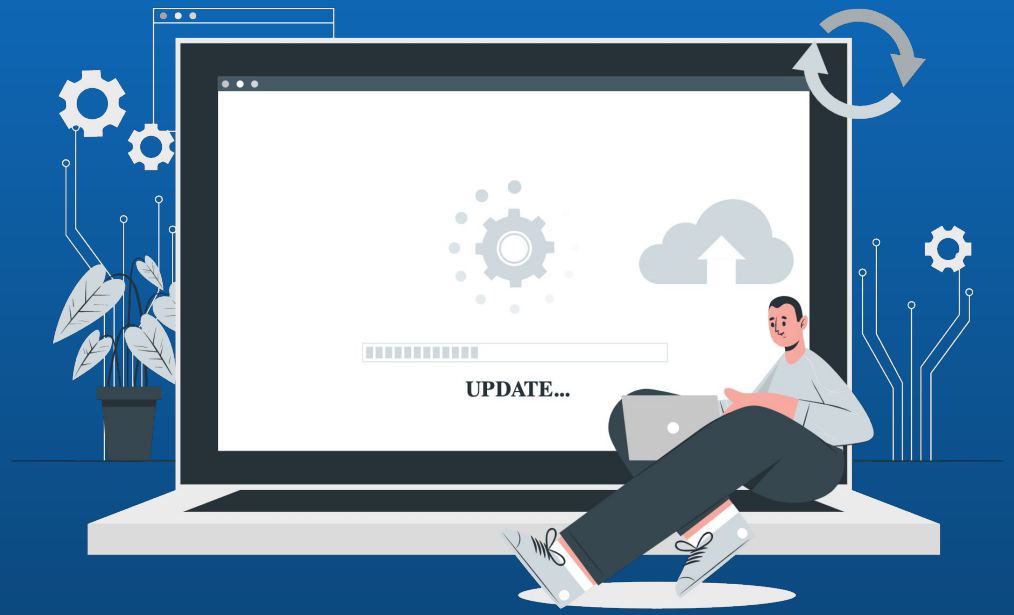
Bitfocus

Getting To Know You

You own a ridiculous amount of?

Agenda

- CoC|Coordinated Assessment Updates
- UPLIFT Updates
- HMIS Newsletter
- Federal Reporting Updates - *SPM Submission and HIC/PIT Updates*
- SCC Customer Portal - *Roadmap and Resource Directory - Destination Home*
- SCC HMIS Client Consent Training - *Timeline and Expectations*
- Mandatory 2022 Trainings **-** *Expiration of Training Availability*
- Reminders
- Next Month's Meeting



CoC|Coordinated Assessment Updates

CoC Updates - *Verbal Update...*

CoC| Coordinated Assessment Updates - *Upcoming Meetings*

Rapid Rehousing and Employment Initiatives Meeting
When: Thursday, March 9th and 23rd, 2023
Time: 3:00pm-4:30pm
Where: Virtual Meeting

Service Providers Network Meeting
When: Wed, March 8th, 2023
Time: 9:30am – 11:00am
Where: Virtual Meeting

SCC TA Office Hours
When: Wednesday, March 29th, 2023
Time: 10:00am-11:00am
Where: Zoom

SCC CoC VI-SPDAT Training
When: Tuesday, March 28th, 2023
Time: 9:00am – 1:00pm
Where: Virtual Meeting

NOFO Committee Meeting #4
When: Thursday, March 23rd, 2023
Time: 1:00pm - 2:30pm
Where: Register Here!

Data Engagement Workshop (DEW)
When: Thursday, March 23rd, 2023
Time: 9:30am - 11:00am
Where: Register Here!

Coordinated Entry Work Group
When: Thursday, March 9th, 2023
Time: 1:00pm - 2:30pm
Where: Register Here!

SCC PMWG
When: Thursday, March 16th, 2023
Time: 1:00pm - 2:30pm
Where: Register Here!

UPLIFT Updates

UPLIFT Updates

Quarter 4 (April – June) UPLIFT begins on Friday, 3/17/2023

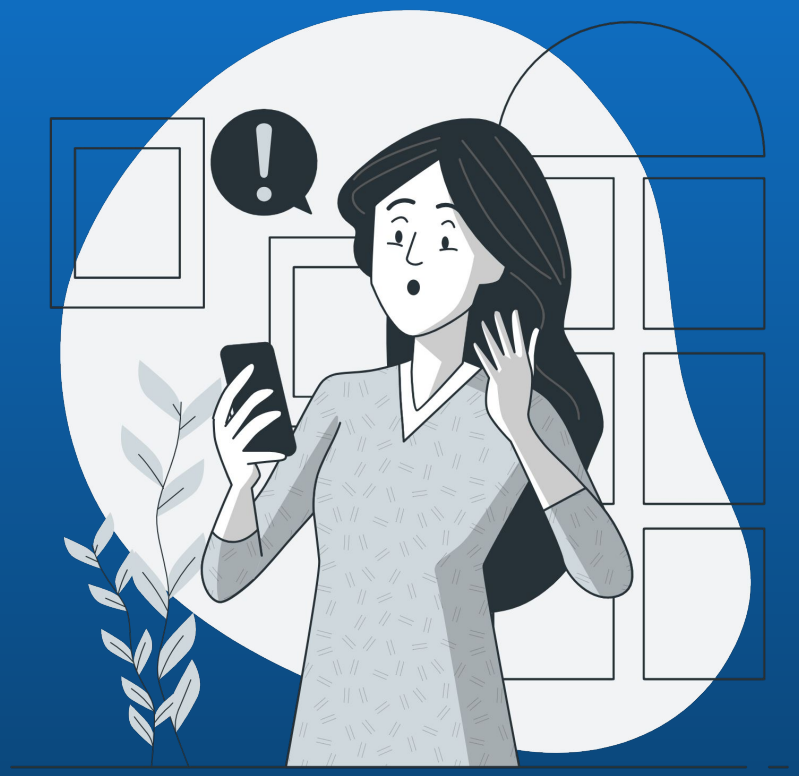
Allocation surveys for Quarter 4 April - June will be emailed to each UPLIFT Agency Coordinator on Monday, 3/6/2023

The UPLIFT Agency Coordinator is the participating agencies contact and liaison for all things UPLIFT-related. Responsibilities include:

- Ensuring new policies/procedures are shared with UPLIFT users
- Approving UPLIFT program access in HMIS for newly trained users at your agency
- Ensuring there is a process in place for safekeeping and tracking of agency UPLIFT passes post-pickup
- Submitting allocation survey each quarter if the need has changed

UPLIFT Mailing List FAQs

- Staff will be added to the mailing list when the UPLIFT Agency Coordinator approves their access to the program in HMIS
- Staff can be added to or removed from the mailing list upon request – email UPLIFT@hhs.sccgov.org



HMIS Newsletter

HMIS February 2023 Newsletter

Welcome to the Santa Clara HMIS February 2023 newsletter!

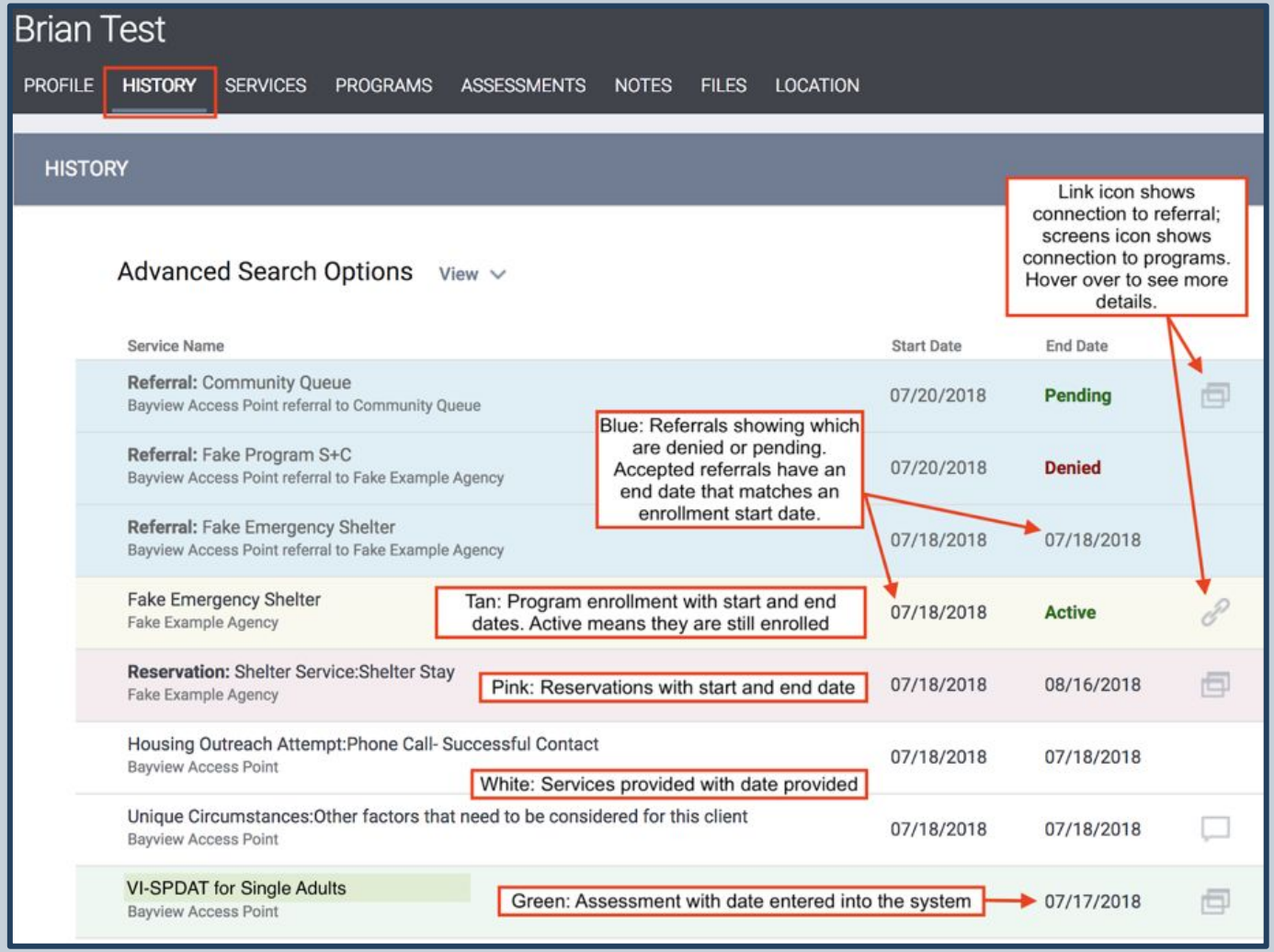
In this edition you'll find the following:

- HIC/PIT - Next Steps
- Security Checklist - Thank you!
- Coming Soon: Santa Clara County Client Consent Training - 2023
- **Using the History Tab**
- Data Quality Check - Referring to the Community Queue (CQ)
- Report Spotlight: CCP Housing Retention Report logic
- Report Updates: Recidivism
- Meeting/Upcoming Events
- Bitfocus is Hiring!

Check out last months Newsletter and other newsletters here!

HMIS February 2023 Newsletter - *Using the History Tab*

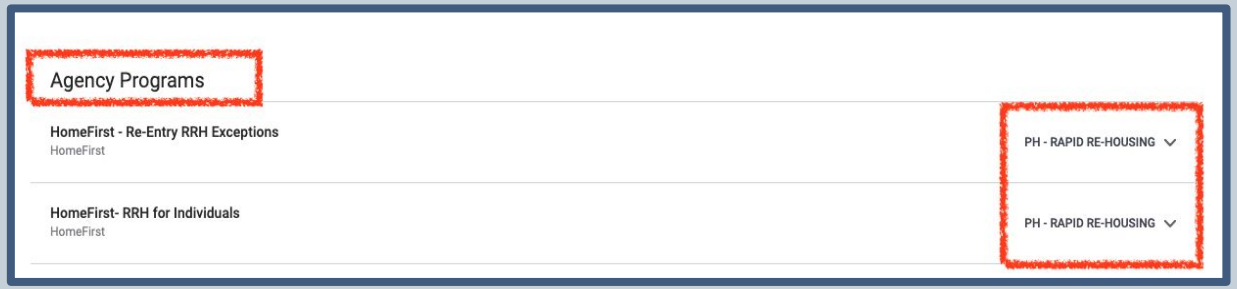
- Assessments = **GREEN**
- Referrals = **BLUE**
- Program Enrollments = **TAN**
- Services = **WHITE**
- CE Events = **PEACH**



HMIS February 2023 Newsletter - *Referring to the Correct CQ*

Please note that HMIS End Users **should not** be referring to:

- **Admin. Only/CET**
- **Direct Referral to Programs**



HMIS February 2023 Newsletter - *[SCC-100] CCP Housing Retention Report*

- Housing Service based report attached to CCP program enrollments
- In addition to the program enrollment, clients must have an active housing service within the report range in order to appear as Housed in this report

SCC CCP Housing Retention

Abode Services

Date Range: 02/01/2021 thru 02/21/2023

GENERAL INFORMATION: This report identifies the percentage of households who retained housing for 12 months or longer and who remained housed as of the report date.

CCP Housing Retention	
Percentage of Households Housed 12 Consecutive Months at Any Time During CCP Enrollment	**0%**
Number of Households Housed 12 Months Consecutive Months since CCP Enrollment	0
Number of Households Housed 12 Months ago (or longer) as of report end date	0
Percentage of Households Housed 12 Months ago (or longer) who remained continuously housed on report end date	**0%**
Number of Households Housed 12 Months ago (or longer) who remained continuously housed on report end date	0
Number of Households Housed 12 Months ago (or longer) as of report end date	0

Federal Reporting Updates

System Performance Measures (SPMs)

We have completed and submitted the SPMs for 2022!

Behind the Scenes - Though there was no outreach for Data Quality clean-up around SPM data all the work you did for LSA and are doing for the HIC/PIT is a contributing factor!

HIC/PIT - *Bed & Unit Inventory & Utilization*

- **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
- Be prepared to provide details about **LOW/HIGH Utilization** if you are not updating BUI for your programs impacted

SCC Customer Portal - *Roadmap & Resource Directory*

HMIS Customer Portal

- Insider view with *Sketch*
- HMIS Customer Portal Progress Update
  - Timeline & Upcoming work
- **We Need Your Help!**
  - Updating the Resource Directory
  - Informing your agency
- Opportunities for Deeper Engagement

HMIS Customer Portal

What access to my information and service journey means to me.

HMIS Customer Portal - *Timeline*

Now	Early Spring	Late Spring	Early Summer	Summer	Late Summer
Info: In & Out	**Recruitment & Feedback Loops**	**Initiate/ Activate Service Partners**	**Connecting Customers**	**Training**	**LAUNCH**
SOP Updates Resource collection	System Partners Customers	Road Shows Beta Reconnect	Peer to Peer Road Shows	Events	Resource Fair/launch event

HMIS Customer Portal - *SOP Update*

Section 20: Electronic Customer Portal Access

The Customer Portal ("The Portal") is software that connects clients to SCC HMIS. Authorized clients may access a portion of their HMIS Record through the Customer Portal.

Identity Verification: Prior to sending a portal invitation the client identity and contact information will be verified by the Partner Agency. Clients will be required to share their full date of birth in HMIS prior to accessing the portal. To verify client identity agencies should ask for the individual's full name and confirm two identifying pieces of information. Identifying information may include: date of birth, contact phone number or address, social security numbers, photo, recent service history, HMIS id number, or other individualized information in the client record. Agency staff will verify the client email listed on the Contact tab in Clarity matches the Email registered to the portal account.

Authorized Access: Only the individual identified in the client record is authorized to access the Customer Portal account. Individuals must be aged 18 or older to access the Customer Portal. If the Customer Portal account is accessed by any unauthorized individual the account should be immediately deactivated. Accounts may be reinstated once the client identity and credentials are verified. An authorized individual may request to have their portal account deactivated at any time.

Portal Information and Communication: Partner Agency Staff will respond to direct messages, requests, and information sent through the Customer Portal in a timely manner. Partner agency staff will review and update information entered through the portal to ensure an accurate and complete client record. Information entered through the Portal is identified in Clarity with a portal icon.

HMIS Customer Portal - *Updated ROI*

SANTA CLARA COUNTY HMIS
CLIENT CONSENT TO DATA COLLECTION AND RELEASE OF INFORMATION

THIS NOTICE DESCRIBES HOW INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY

The Santa Clara County Homeless Management Information System ("SCC HMIS") is a shared database and software application which confidentially collects, uses, and shares client-level information related to homelessness in Santa Clara County. On behalf of the Santa Clara County Continuum of Care ("CoC"), SCC HMIS is administered by the County of Santa Clara ("County") and Bitfocus, Inc. ("Bitfocus") in a software application called Clarity Human Services ("Clarity"). Clients must consent to the collection, use, and release of their information, which helps the CoC to provide quality housing and services to homeless and low-income people.

Client information is collected in SCC HMIS and released to housing and services providers (each, a "Partner Agency," and collectively, the "Partner Agencies"), which includes community based organizations and government agencies. Partner Agencies use the information in SCC HMIS: to improve housing and services quality; 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 delivery, impact, and quality of housing and services.

Client information is protected by limiting access rights to the database and by limiting the parties to whom the confidential information may be released, in compliance with federal, state, and local regulations governing the confidentiality of client records. Each person or agency with access rights to SCC HMIS, or to whom client information is released, must sign an agreement to maintain the security and confidentiality of client information. Upon any violation of the agreement, access rights may be terminated, and the person or agency found to be in violation of the agreement may be subject to further penalties.

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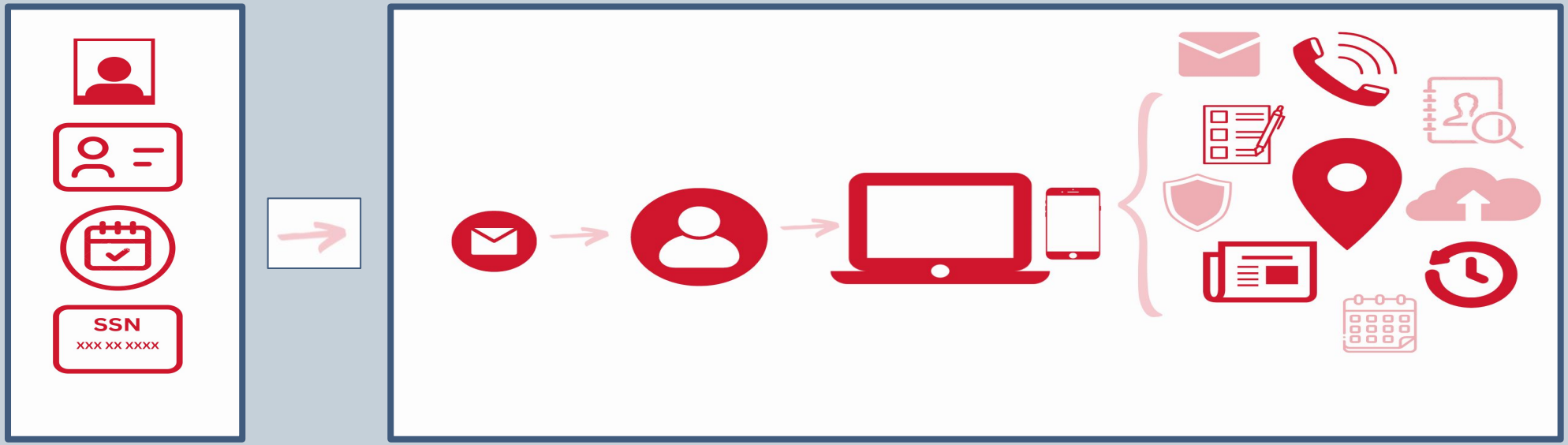
HMIS Customer Portal - *Help Us Get Moving*

- ✓ Resource Collection Form
- ✓ Spread the word throughout your agency
- ✓ Communicate your questions and concerns



HMIS Customer Portal - *Opportunities for Deeper Engagement*

If you're excited about this shift in access and service, or know someone who might be: ***JOIN US!***

- ✓ People with Lived Experience of Homelessness
- ✓ Direct Service Providers

Working Group: Every other Tuesday 11am-12pm Virtually

Join the Interest List

Invites to focus groups, events, and other cool things

SCC HMIS Client Consent Training 2023

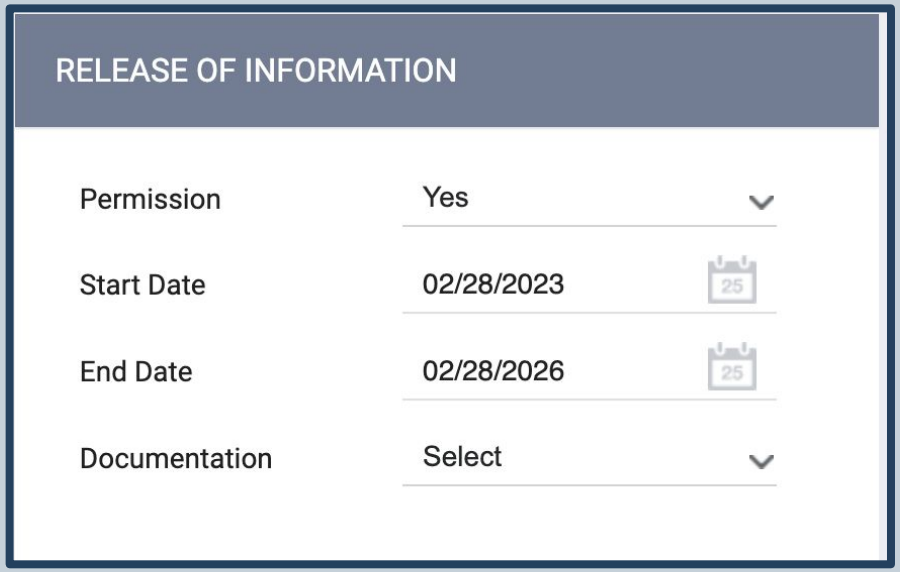
SCC HMIS Client Consent Training - *Timeline & Expectations*

Santa Clara County Client Consent Training - 2023

Available in Early-March

Training Goals

- ✔ Confirm staff knowledge around privacy considerations for HMIS
- ✔ Client consent requirements, best practices for protecting personally identifiable information (or PII)
- ✔ Features of Clarity Human Services software that help in protecting privacy



Timeline

Staff must complete the training and pass the quiz within 3 weeks of the training release date

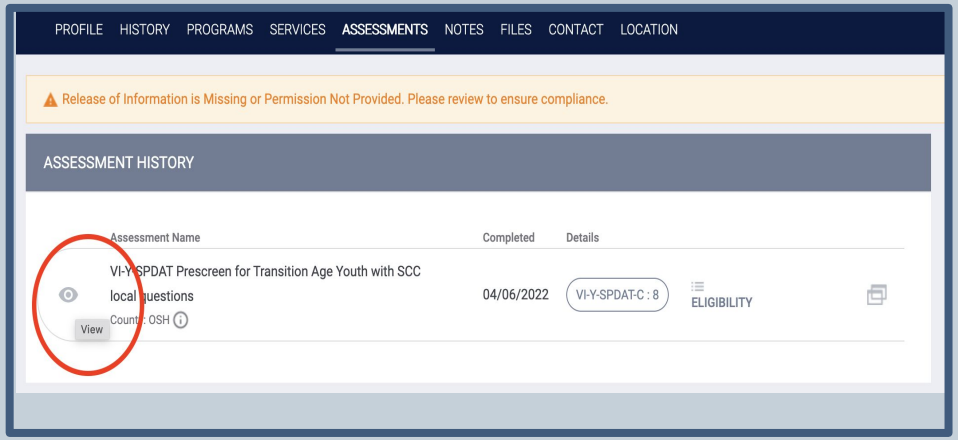
Mandatory 2022 Trainings

Mandatory 2022 Trainings - *Expiration of Trainings*

Mandatory 2022 Trainings will expire on March 31st, 2023

VI-SPDAT assessors who HAVE NOT yet completed these trainings:

- ✔ Please complete these trainings by March 31st, 2023
- ✔ If staff have not completed by this date, they will be required to complete the CoC VI-SPDAT training to regain assessor access



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

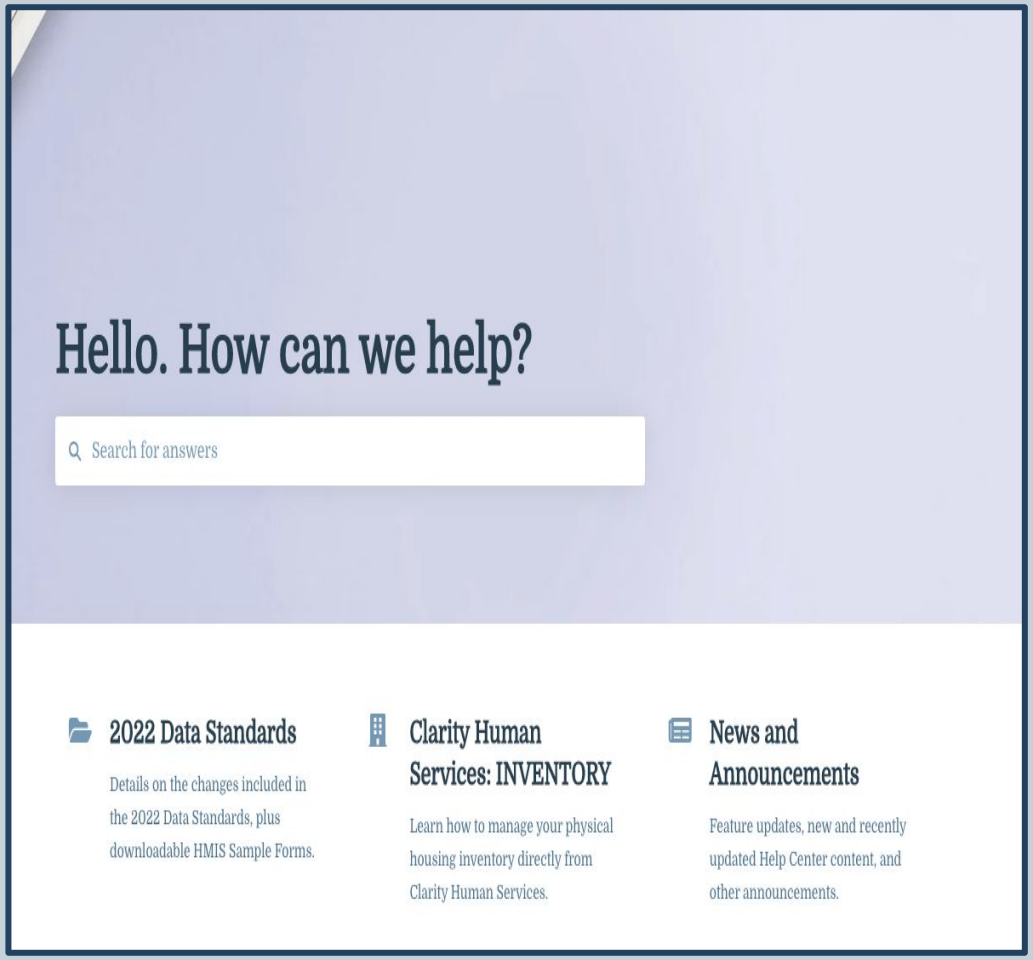
In partnership with Santa Clara County, Clarity Human Services Software, a division of Bitfocus, Inc., administers the County's Homeless Management Information System ("HMIS"), a shared database software application which confidentially collects, uses, and releases client-level information related to 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.

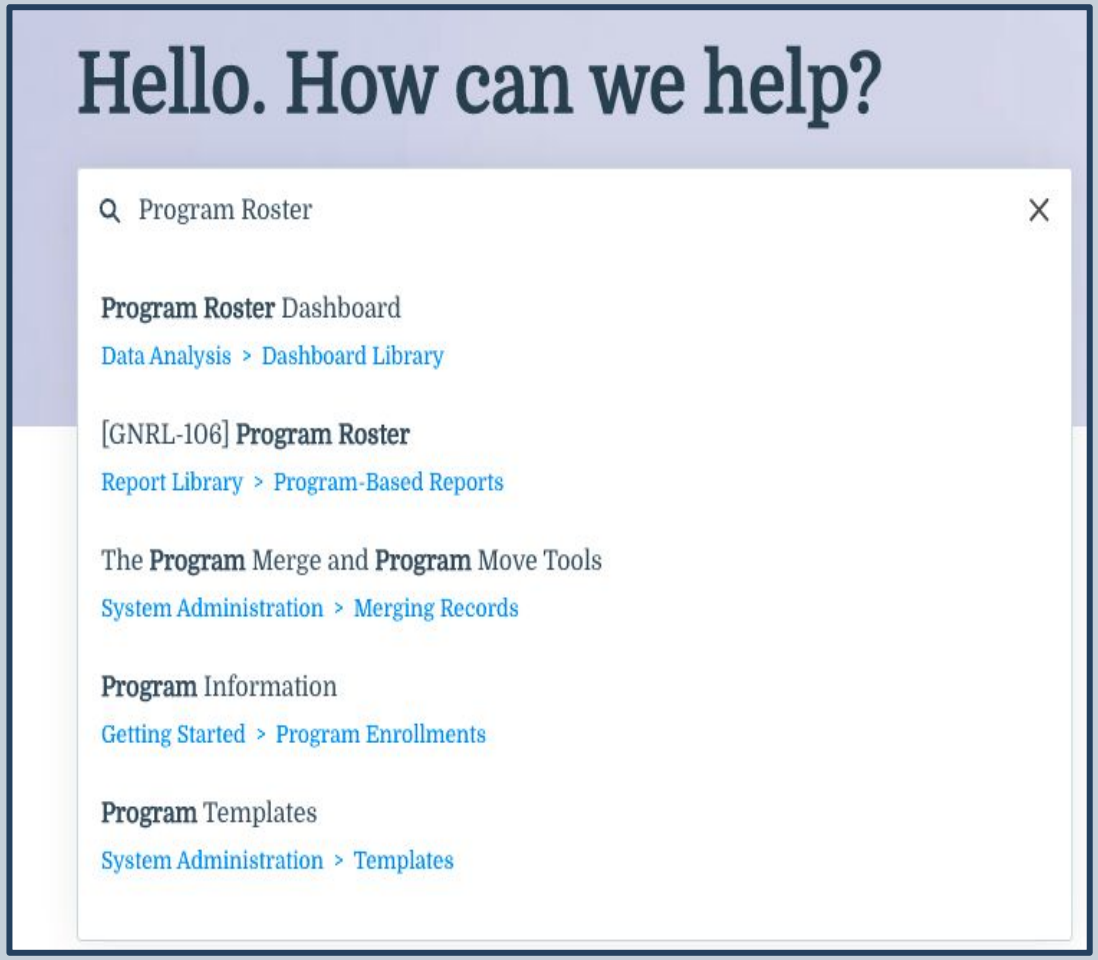
Compliance Certification Schedule:

- 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 was due for **ALL STAFF** added during the 2022 year - January through December
- ✓ <u>If you do not submit your certification form ALL STAFF at your agency will loose HMIS access until it is submitted</u>
- ✓ *DUE DATE: Friday, February 3rd, 2023*

Reminder - *Clarity Human Services Help Center*





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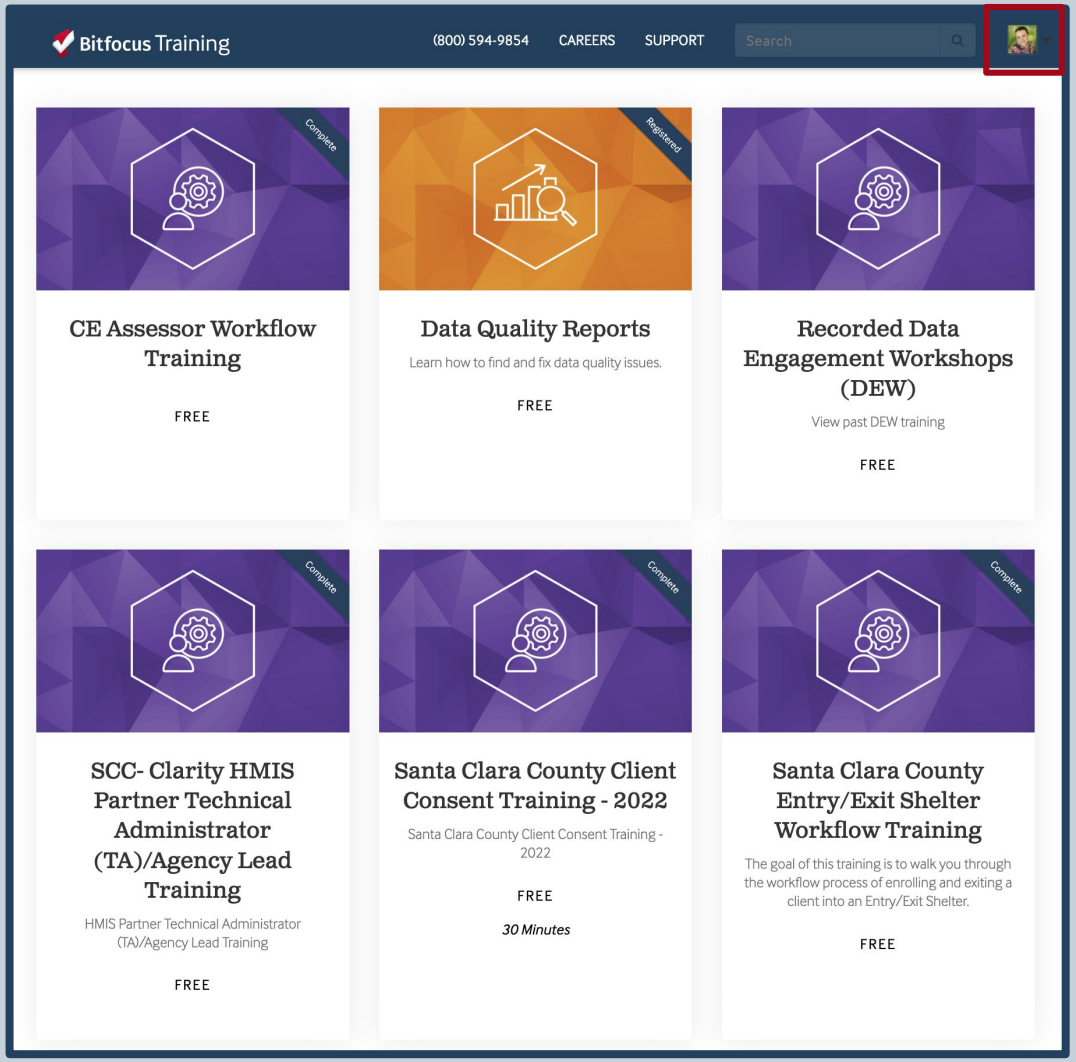
Reminder - *Clarity Training Opportunities*



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

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.

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

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

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!

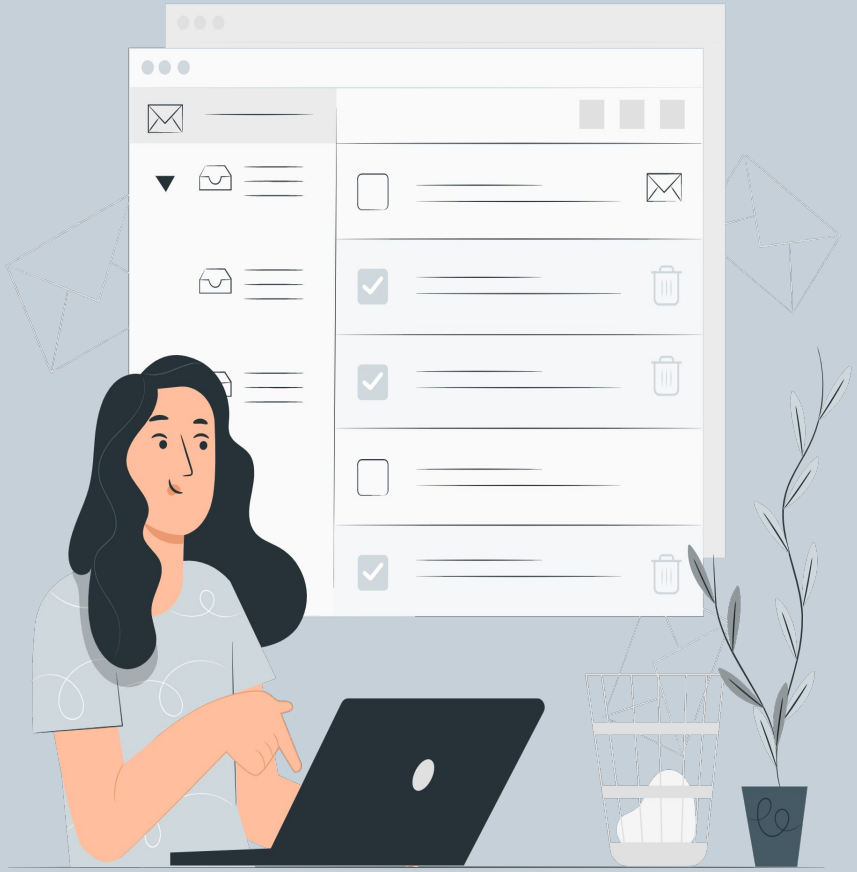
It's a one STOP shop for all items End User related

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

Reminders - Test Clients

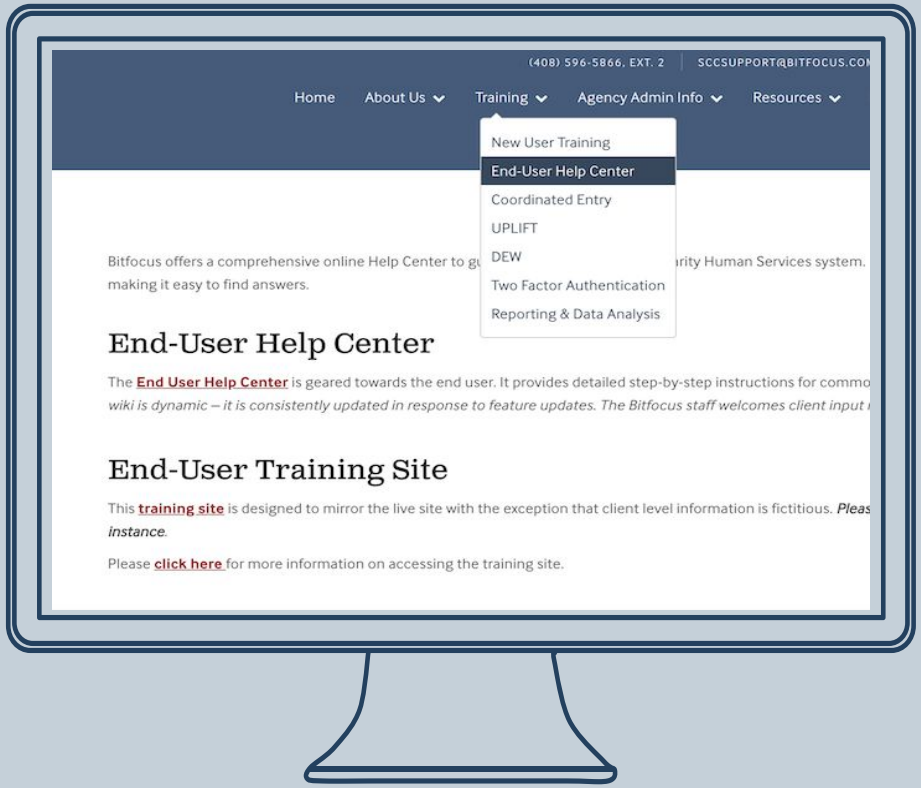
- Please **do not enter TEST CLIENTS** into the live instance
- **Test clients will be deleted during data quality clean-up**
- Use the SCC Training Site to do testing
- If you do enter a test client, please be sure to remove them

This will avoid Federal Reporting Data Quality issues



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

Reminders - *Using the Help Desk*

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

Next Month's Meeting

Thursday, April 6th, 2023

*Illustrations provided by Storyset.com