



# Agency Admin. Meeting

## Thursday, June 2nd, 2022



# Getting To Know You

*What food were you forced to eat as a child that you will never eat again?*



# Agenda

- User Satisfaction Survey - *Results!*
- CoC Updates
- UPLIFT Updates
- HMIS Newsletter
- Feature Focus Updates - *What You Should Know!*
- Data Quality - *Bed and Unit Inventory Emails & Next Steps*
- Upcoming DEW - *Navigating the HMIS Report Library & The Importance of Data Quality*
- Reminders
- Next Month's Meeting



# User Satisfaction Survey *Results*



# 2022 HMIS User Satisfaction Survey - *Results*

Here to present the findings is Maegan Zielinski from our Professional Services Team



How is HMIS working for you?

2022 HMIS User Satisfaction Survey

OK, let's get started



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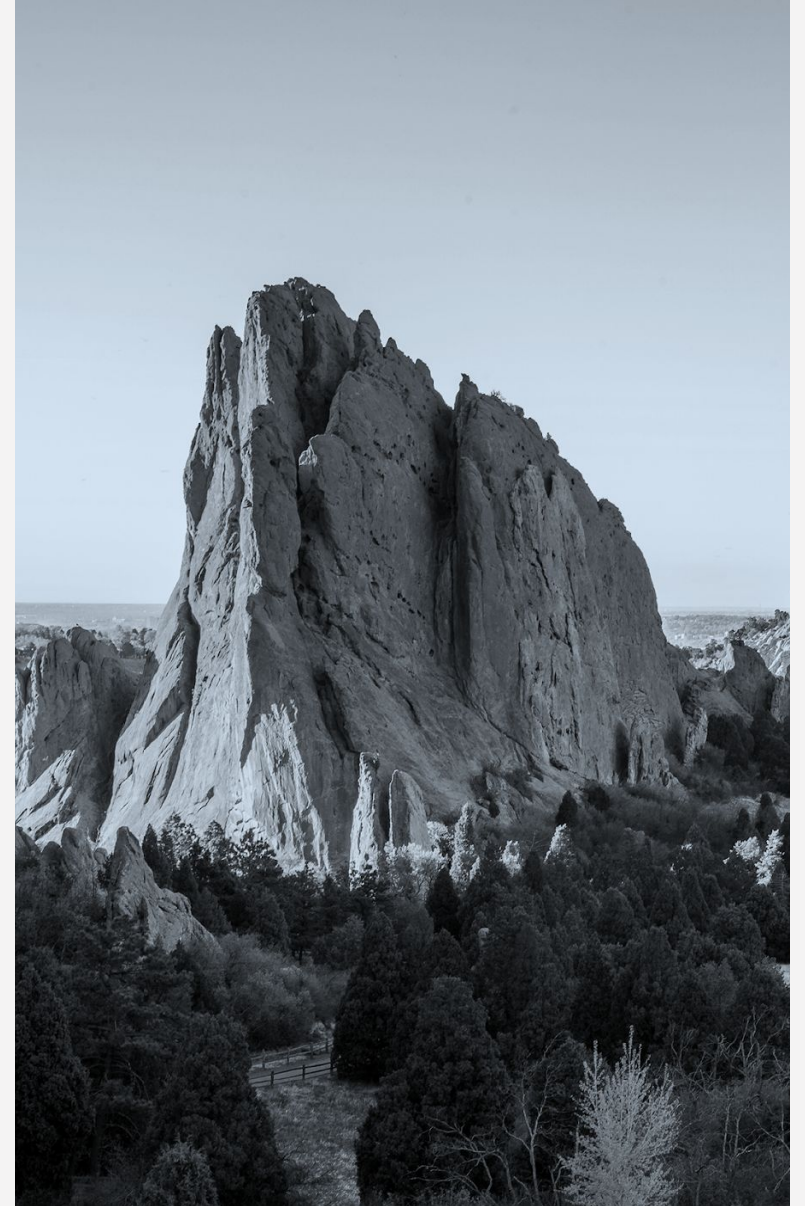
# 2022 SCC Annual User Satisfaction Survey





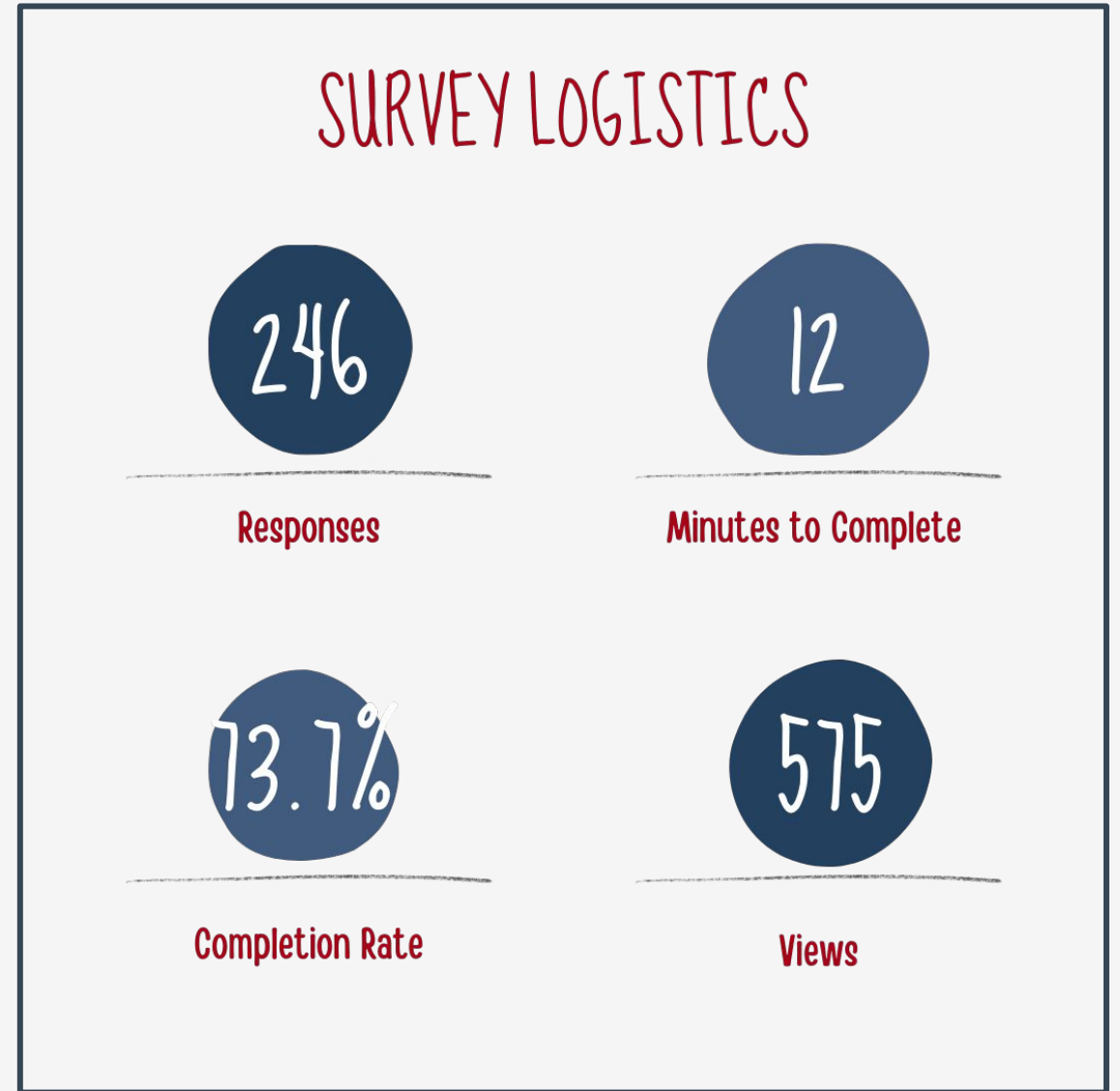
# Goals

- Understand the results of the Annual Survey
- Note changes & improvements for next year's survey



# Survey Logistics

- 246 responses > 109 more than last year!
- 12 minutes to complete
- 575 views, 336 starts, 246 submissions
- 73.7% completion rate
- Biggest drop off was at question 1 “How is HMIS working for you” (42% dropped off)



# Type of Services Agencies Provide

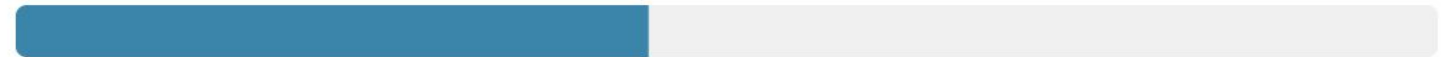
Supportive Services (e.g. case management, housing search assistance; medical & psychological counseling; job training & placement; substance abuse treatment & counseling; nutrition assistance; childcare; transportation; Federal, state & local benefits)

153 resp. 62.4%



Emergency Shelter

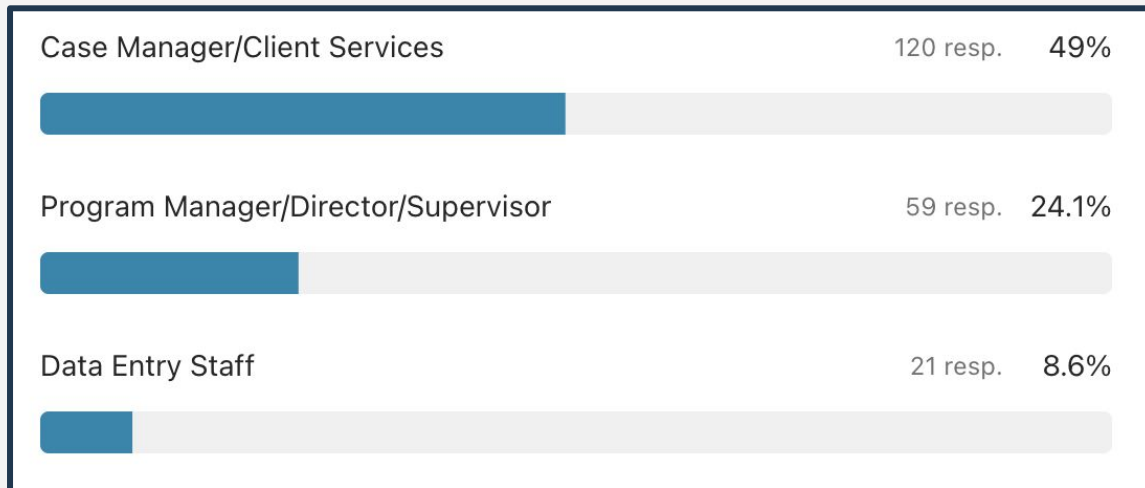
109 resp. 44.5%



- Over half of respondents were in a supportive services role
- Second highest role was “Emergency Shelter”
- 2% responded as “Other”
  - Recommend combining some of the “other” responses into the general categories



# Primary Role



- Case Manager/Client Services was the primary role of respondents
- Program Manager/Director/Supervisor were the next highest
- Less than 9% were data entry staff
- Recommend adding descriptions or examples of roles based on the "Other" category



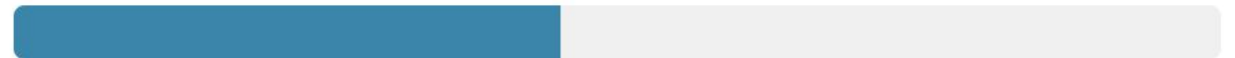
# Using Clarity

- 57% Enter data into Clarity only for clients that they work with regularly
- 45% Enter VI-SPDATs into Clarity for Coordinated Assessment
- 42% Enter data into Clarity for one or more programs at my agency, regardless of how closely they work with the clients served
- 8% don't enter any data into HMIS

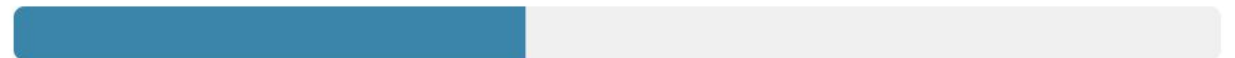
Enter data into Clarity only for clients that I work with regularly 140 resp. 57.1%



Enter VI-SPDATs into Clarity for Coordinated Assessment 111 resp. 45.3%



Enter data into Clarity for one or more programs at my agency, regardless of how closely I work with the clients served 104 resp. 42.4%





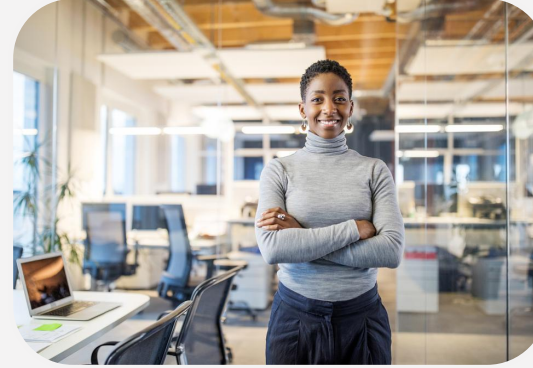
# Frequently Run Reports



**44%** of end users run program-based reports like the program roster and program details



**36%** frequently run HMIS data quality reports



**33.5%** frequently run user-based reports



**12%** are not using reports, of those who run reports most find them easy to run





# Clarity Usage Experience



# HMIS Systems

## Does your agency use another data management system?

- 47% responded YES, they do use another data management system
- 52% responded NO, they do not use another data management system

- Other (36%)
- Salesforce (35%)
- AWARDS (14%)
- APRICOT (6%)
- EPIC (6%)
- Another Version of Clarity (>2%)



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# Reasons for Additional Data Management System?

- Need to capture more data than available in Clarity
- Required by Funding Agency
- Need specific reports
- Use for billing
- Provides functionality not available in Clarity
- Other



# Data Quality



Respondents feel confident about the data being entered by their agency and the other agencies



Data quality is a high priority for end users



Respondents feel it's easy to enter client-level data into Clarity



# Overall Satisfaction



## Users are...

- Satisfied with Clarity Human Services
- Satisfied with Bitfocus Help Desk
- Satisfied with System Administrator Team



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# Compared to Last Year

## What stayed the same...

- The type of services provided and roles of End Users
- Program-based reports are most frequently used, HMIS Data Quality remains second
- Respondents have 2 or more years of experience with Clarity
- Salesforce is the other leading HMIS software
- Other software is used to capture data not currently in HMIS
- End users value and prioritize data quality as being important and trust data being entered by others
- Low utilization of reporting (low response rates)
- End Users remain satisfied with Bitfocus services (Help Desk, System Administration Team, etc.)
- Recommendation from last year - **Report Training**





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# Compared to Last Year

## What changed...

- More Survey responses this year!
- Slight difference in the use of Clarity
  - Last year it was mostly completing the VI-SPDAT assessment
  - This year it was entering general data into Clarity
- Last year **58%** stated using another data management system compared to **47%** this year



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# Recommendations

- Opportunities for General Training
- Report Training
- Workflow Training
  - (entering data, less clicks, etc.)
- Adding follow up constraint when **“Other”** is selected in the Survey





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# Questions?





# CoC|Coordinated Assessment Updates

# CoC| Coordinated Assessment Updates

- 1. The CoC Board approved NOFO Committee recommendations at its May 27<sup>th</sup> Board meeting**
  - a. Recommendations presented:
    - i. Client Feedback Process
    - ii. Implement this year, but not to be included in scoring until next year
    - iii. Changes to Qualitative Factors for Housing First, Alignment with CoC Priorities, Client Participation
    - iv. Racial Equity Scoring Factors
    - v. Reducing Application Burden
- 2. Coordinated Entry Redesign**
  - a. Prioritization Committee is meeting every Monday (since 5/9)
  - b. Establish guiding vision and goals for the redesign process, identify priorities, and define “vulnerability”
- 3. Youth Homelessness Demonstration Program (YHDP)**
  - a. Final plan will be presented to CoC Board on 6/17
  - b. Project applications due in eSnaps by 6/30
  - c. Implementation planning (June – August)

# CoC| Coordinated Assessment Updates - Upcoming Meetings

## Service Providers Network Meeting

When: Wednesday, June 8th, 2022

Time: 9:30am – 11:00am

Where: [Zoom](#)

## CoC Training : CoC Program Compliance 101 Training Series

When: Thursday, June 9th, 2022

Time: 11:00am-12:00pm

Where: [Zoom](#)

## Data Engagement Workshop - DEW

When: Thursday, June 16th, 2022

Time: 10:00am-12:00pm

Where: [Zoom](#)

## Rapid Rehousing and Employment Initiatives Meeting

When: Thursday, June 9th and 23rd, 2022

Time: 3:00pm-4:30pm

Where: Virtual Meeting

## Practice Documenting Category 1 Eligibility

When: Thursday, June 9th, 2022

Time: 11:00am-12:00pm

Where: [Zoom](#)

## Performance Management Work Group (PMWG)

When: Thursday, June 16th, 2022

Time: 1:00pm-2:30pm

Where: [Zoom](#)

## SCC TA Office Hours

When: Wednesday, June 29<sup>th</sup>, 2022

Time: 10:00am-11:00am

Where: [Zoom](#)



# UPLIFT Updates




# UPLIFT Updates

- Quarter 1 begins on 6/17/2022
- **We are returning to the practice of quarterly allocations**
  - Starting 6/17/2022 – 7/31/2022 you can request number of allotted passes
  - Starting 8/1/2022 remaining passes will be pooled, and requests processed on a first come first serve basis
  - An allocation survey was sent last **Thursday on May 26th**
    - i. Provide an estimate of how many stickers you will need for the July – September quarter
    - ii. Deadline to submit survey is **5pm on 6/2/2022**
    - iii. If you do not respond, your agency will be assigned allocation based on (1) availability and (2) number of passes requested for Apr-Jun quarter
  - Allotments will be shared before start of new quarter
  - Allocation details can be found in the **UPLIFT handbook**
  - Please send all email communications to [UPLIFT@hhs.sccgov.org](mailto:UPLIFT@hhs.sccgov.org) - *PLEASE DO NOT email individual employees!*



# HMIS Newsletter

# HMIS May 2022 Newsletter



## Santa Clara HMIS News, May 2022

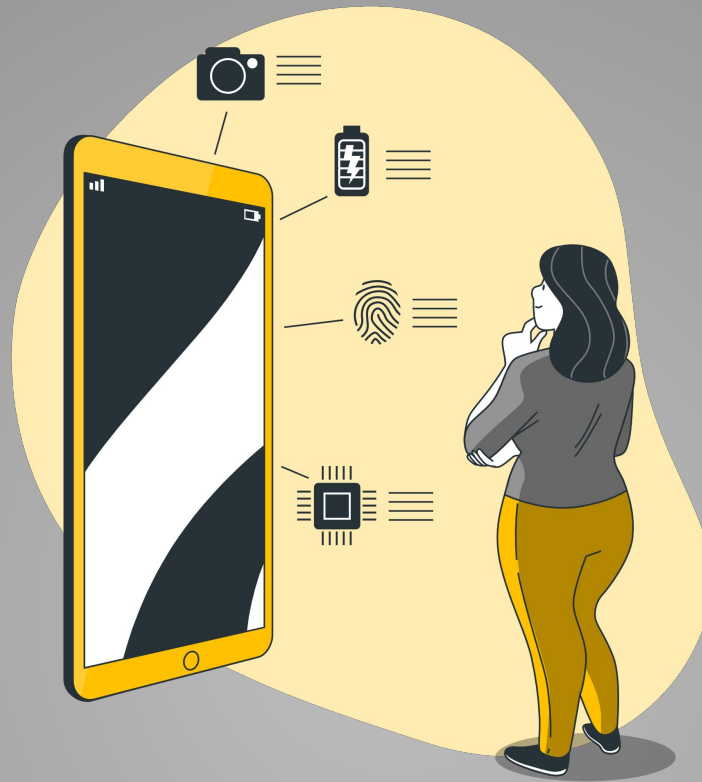
Welcome to the Santa Clara HMIS May 2022 newsletter!

**In this edition you'll find the following:**

- New Features in Clarity Human Services
- HIC/PIT Submission
- The Caseload Tab
- End User Participation: It's Importance & Meaning
- Report Spotlight: [GNRL-405] CE Assessing Staff Report
- Meetings/Upcoming Events and Training Opportunities
- Bitfocus is Hiring!

*Check out last months Newsletter and other newsletters [here!](#)*





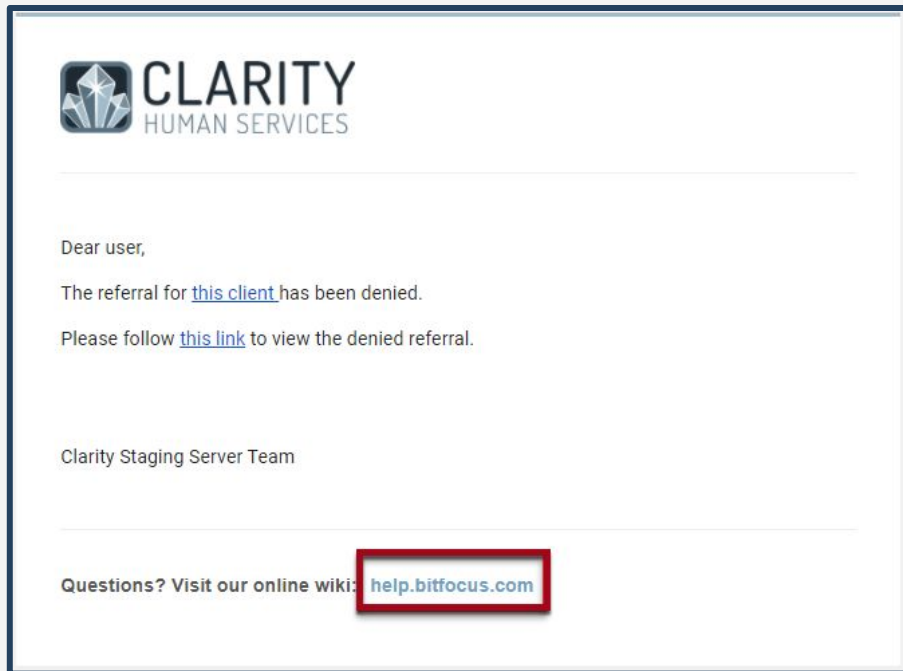
# Feature Focus Updates

*What You Should Know!*

# Feature Focus - *What You Should Know*

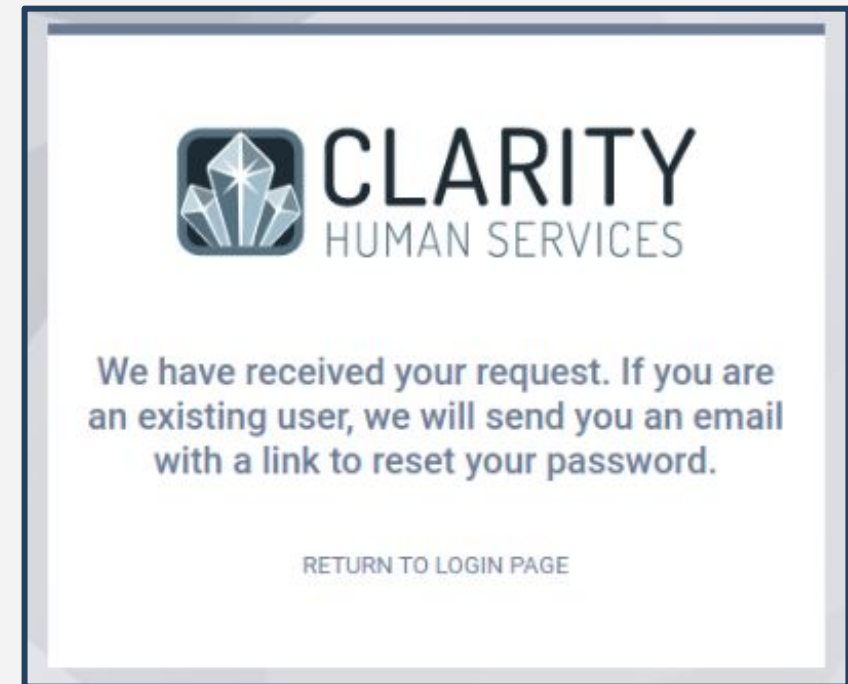
## Updated: Help Center Link in System Emails

Overview: We have updated the Help Center link in all emails sent by the system from get.clarityhs.help to [help.bitfocus.com](https://help.bitfocus.com).



## Updated: "Forgot Password" Response

Overview: When a user clicks the FORGOT PASSWORD link and enters an email address, the system will now display the following message: "We have received your request. If you are an existing user, we will send you an email with a link to reset your password."



# Feature Focus - *What You Should Know*



## Updated: Service Transaction Date Validation Language

Overview: The system now checks to make sure that dates entered for service transactions (Start Date, End Date, Date, and Event Date) are between January 1, 1970 and January 1, 2038.

If you enter a date that is before 01/01/1970, you will see the following message: "Service Date must be after 12/31/1969." You will not be able to submit the service transaction until you correct the date.



If you enter a date that is after 01/01/2038, you will see the following message: "Service Date must be before 01/01/2038." You will not be able to submit the service transaction until you correct the date.

The screenshot shows a web form titled 'SERVICES'. Under the 'Housing' section, there is a 'Daily' tab selected. The 'Start Date' is set to '04/11/1969' and the 'End Date' is '04/11/2022'. A red underline is under the 'Start Date'. A message box below the dates reads: 'Service Date must be after 12/31/1969.' A 'SUBMIT' button is visible at the bottom right of the form.

The screenshot shows the same 'SERVICES' form. The 'Start Date' is now '04/11/2022' and the 'End Date' is '04/11/2038'. A red underline is under the 'End Date'. A message box below the dates reads: 'Service Date must be before 01/01/2038.' A 'SUBMIT' button is visible at the bottom right of the form.



# Data Quality

## *Bed and Unit Inventory Emails & Next Steps*

# Data Quality - *Bed and Unit Inventory (BUI) Emails & Next Steps*

## Email Messaging that went out...

You are receiving this message because you are listed as the Agency contact for Abode. We are seeking your assistance in ensuring that we have the correct Bed and Unit Inventory (BUI) for your program(s). HMIS must have an accurate record of bed and unit inventory information for all residential projects (ES, TH, SH, RRH, PSH). An accurate and up-to-date housing inventory is essential to managing vital housing resources in the community. This message will go out monthly.

Instructions: Review the Bed/Unit Inventory table attached. If there are changes or additions to the bed or unit inventory complete the **BUI Update Form here.** The table also shows the approximate recent utilization to aid in this determination. Please verify and/or provide updates to the Bed/Unit inventory by Friday, May 27, 2022.

## Please be sure and...

- ✓ Review the report provided
- ✓ If current availability is in the negative (-) please make sure to...
  - Exit Clients were necessary
  - Update BUI to reflect amount of clients residing in program
- ✓ If total in use is zero (0), please also revise BUI or be sure to enter clients
- ✓ If overall capacity needs to be updated please submit the BUI Update Form ASAP
- ✓ Please submit revisions by due date provided
- ✓ Recall that BUI affects Federal Reporting & Data being used by SCC OSH

# Data Quality - *Bed and Unit Inventory (BUI) Emails & Next Steps*

Current Housing Availability

CoC Category Filter: Agency CoC

Client Location Filter: No

Transitional Housing

Agency Name	Program Name	Capacity	Total in Use	Current Availability
		3 Units 12 Beds	10 Households 10 Clients	-7 Units 2 Beds
		3 Units 5 Beds	0 Households 0 Clients	3 Units 5 Beds
		5 Units 7 Beds	7 Households 7 Clients	-2 Units 0 Beds
		2 Units 8 Beds	8 Households 8 Clients	-6 Units 0 Beds



# Upcoming DEW

## *Navigating the HMIS Report Library & The Importance of Data Quality*

# Data Engagement Workshop -

## *Navigating the Report Library & The Importance of Data Quality*

Santa Clara County's CoC, in collaboration with Bitfocus, hosts quarterly **Data Engagement Workshops** aimed at increasing data literacy at agencies in the region. The workshops consist of a series of training opportunities and development of learning materials for the CoC and community partners.



*In this workshop we will provide users with a comprehensive overview of the **HMIS Report Library including Data Analysis and the importance and usefulness of the data quality as part of program evaluation and improvement.** This is a great workshop for staff who want to learn how to better utilize the tools in Clarity!*



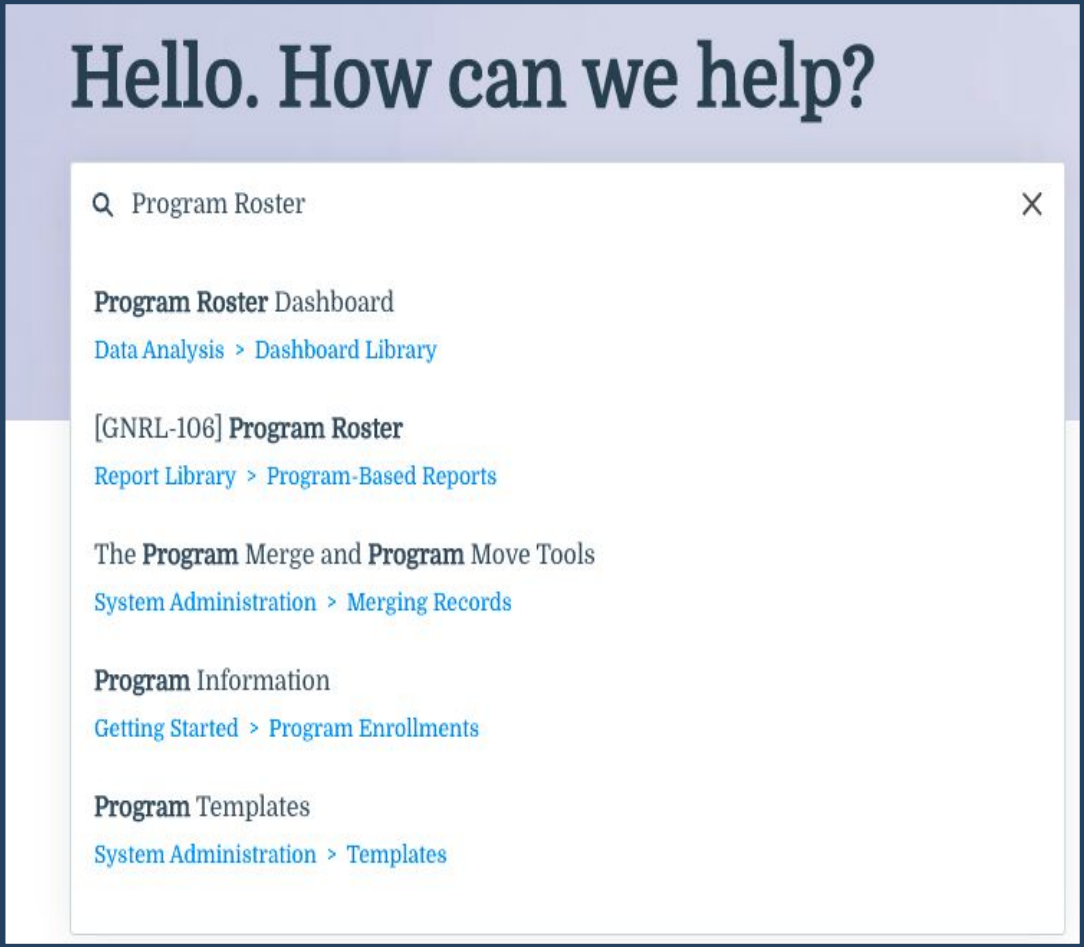
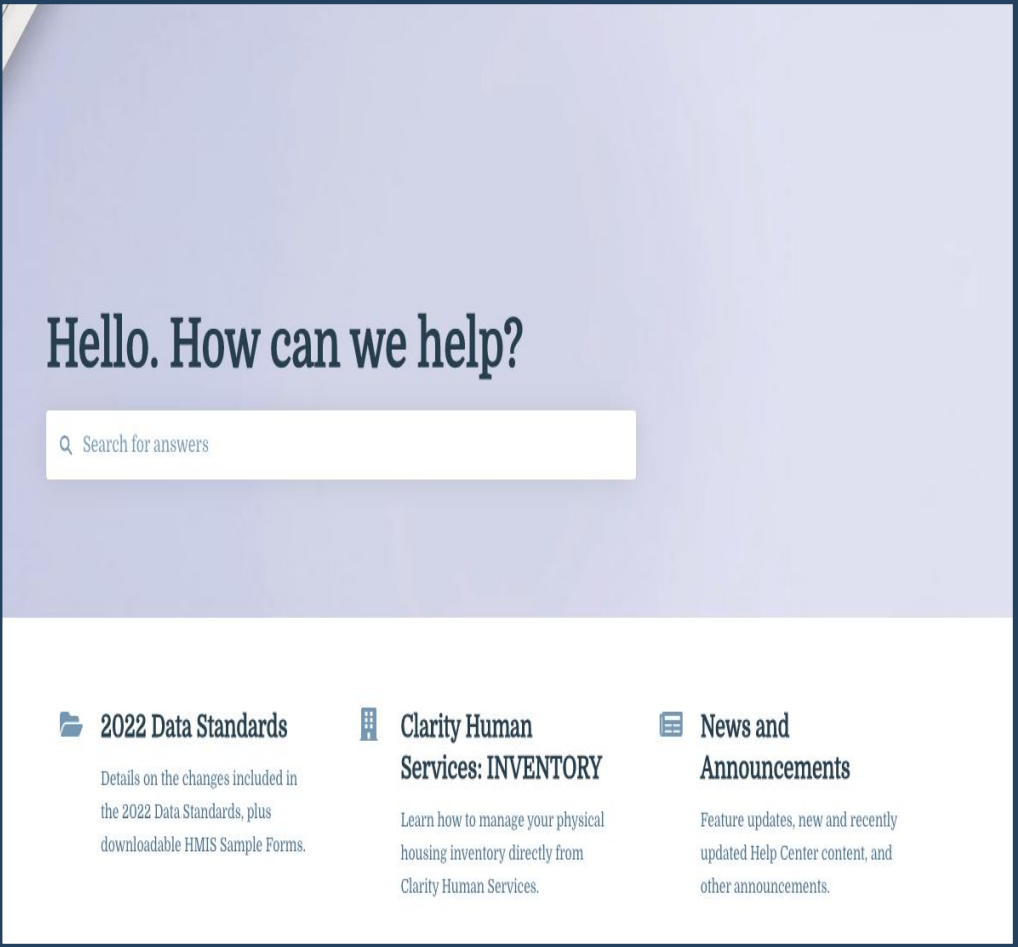
**Thursday, June 16th, 2022**  
**10:00am - 12:00pm**  
[Register HERE!](#)





# Reminders

# Reminder - *Clarity Human Services Help Center*




*Link to page embedded in image!*

# 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
- 4 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](mailto: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](mailto: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](mailto:sccsupport@bitfocus.com)  
Phone Number: (408) 596.5866 Ext. 2  
Sys. Admin. Team: [scc-admin@bitfocus.com](mailto: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.



*Check out our latest addition to Resources for End Users!*

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

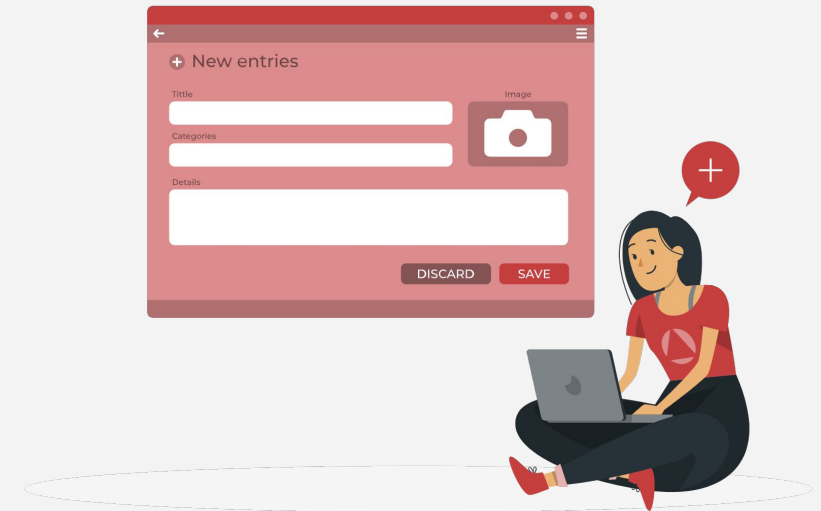
*Please be sure and share this practical and easy to use resource!*

*Link to Resource embedded in image!*

# Reminders - Test Clients

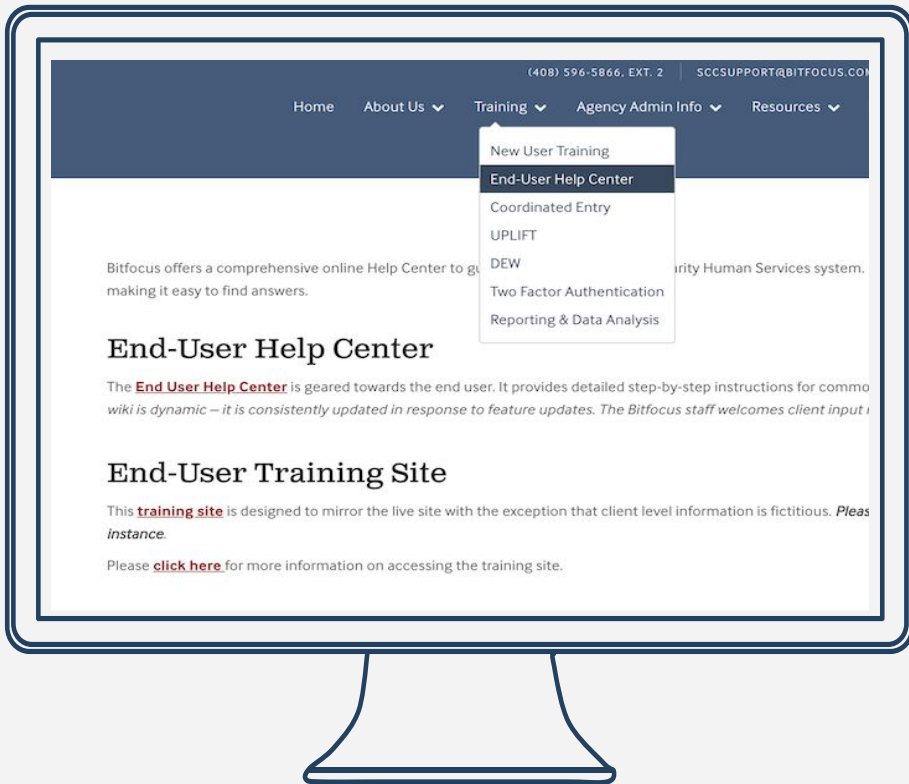
- Please do not enter TEST CLIENTS into the live instance
- **Test clients will be deleted during data quality clean-up**
- Use the SCC Training Site to do testing
- If you do enter a test client, please be sure to remove them

*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](mailto: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*

*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

# Next Month's Meeting

*Thursday, July 7th, 2022*

