Agency Admin. Meeting

Thursday, October 6th, 2022

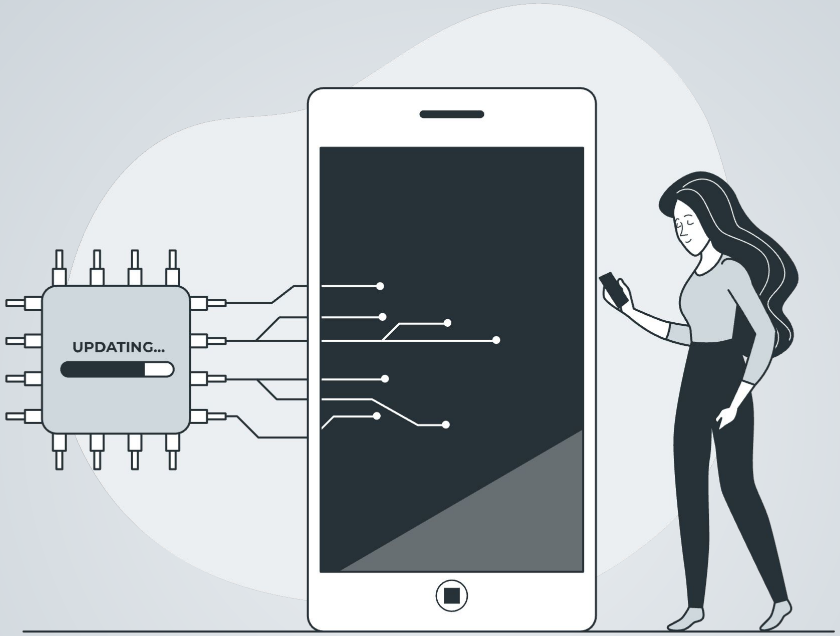
Bitfocus

Getting To Know You

Do You Have Any Phobias?

Agenda

- CoC Updates
- UPLIFT Updates
- HMIS Newsletter
- **Interim** VI-SPDAT Training - *Mandatory*
- Security Breach - *OSH Guidance & Next Steps*
- Security Checklist - *DUE 10/31/2022*
- Federal Reporting - *Updates*
- CE Events - *Changes*
- Reminders
- Next Months Meeting



CoC|Coordinated Assessment Updates

CoC Updates

1. CoC NOFO and Unsheltered NOFO
2. Coordinated Entry Redesign
3. Youth Homelessness Demonstration Program (YHDP)

CoC| Coordinated Assessment Updates - *Upcoming Meetings*

SCC TA Office Hours (Interim VI-SPDAT Focus)
When: Wednesday, October 26th, 2022
Time: 10:00am-11:00am
Where: Zoom

Rapid Rehousing and Employment Initiatives Meeting
When: Thursday, October 13th and 27th, 2022
Time: 3:00pm-4:30pm
Where: Virtual Meeting

SCC: Performance Management Work Group
When: Thursday, October 20th, 2022
Time: 1:00pm – 2:30pm
Where: Zoom

SCC CoC VI-SPDAT Training
When: Wednesday, October 26, 2022
Time: 9:00am – 1:00pm
Where: Virtual Meeting

UPLIFT Updates

UPLIFT Updates

New process coming soon for requesting replacements for lost badges and/or stickers!

- Office closed Monday, October 10 – no pick-up
- Pooled sticker period begins on November 1 – remaining stickers are provided on a first-come first-serve basis.
    - Any requests submitted prior to Nov 1 for agencies who have reached their allocation limit will be removed.

Reminders

- Your requests must be submitted through either an Enrollment or a Status Update Assessment/Annual Assessment
- Correcting ROI issues
- Please ensure UPLIFT staff are exiting clients from your UPLIFT program if:
    - You are no longer requesting UPLIFT passes for the client
    - You are no longer working with the client
    - The client is no longer eligible for the program

HMIS Newsletter

HMIS September 2022 Newsletter

Welcome to the Santa Clara HMIS September 2022 newsletter!

In this edition you'll find the following:

- 2022 Federal Reports: LSA and System Performance Measures are Approaching!
- Report Spotlight - **[HUDX-225] HMIS Data Quality**
- CE Workflow Fully Implemented: Do's and Don'ts
- Coming Soon: Revamped Coordinated Entry Events
- Interim VI-SPDAT: Due October 13th
- SCC HMIS Compliance Certification Checklist - Due Soon
- Training Recording: Navigating the HMIS Report Library & Data Analysis 201
- New Features in Clarity Human Services
- Meetings/Upcoming Events
- Bitfocus is Hiring!

Check out last months Newsletter and other newsletters here!

HMIS September 2022 Newsletter - *LSA Reports Highlight*

Announcements

2022 Federal Reports: LSA and System Performance Measures are Approaching!

The 2022 federal reporting season is approaching! Prep for two of HUD's major CoC reports will begin in October: The Longitudinal Systems Analysis (LSA) and System Performance Measures (SPM).

HUD's **Longitudinal Systems Analysis (LSA)** is a report submitted to HUD annually that includes a complex analysis across key projects participating in the Continuum of Care (CoC) Homelessness Management Information System (HMIS). The LSA replaced the Annual Homeless Assessment Report's (AHAR) data component in the 2018 reporting year.

Continue reading

Additionally, we are asking all Agency Leads to review your agency's data by Friday, October 21.

You can review your data by doing the following:

1. Run the **[HUDX-225] HMIS Data Quality** Report for the period 10/1/21 to 9/30/22 (you'll find this report in the Clarity Human Services Report Library under HUD Reports). Correct records with errors, paying special attention to any element that shows over a 5% error rate (remember, clicking on a number will give you a list of clients being counted in that number).
2. Run the **[GNRL-106] Program Roster** for the period 10/1/21 to 9/30/22 (this report is under Program Based Reports) and make sure household groups are correct (households are separated by bold lines. Clients not separated by lines are grouped together in a household). If you notice that clients are missing, check out our Help Center article: How do I add a new household member to the Program? If clients are grouped together incorrectly, contact the Helpdesk to get them corrected. Some measures only count heads of household, so it's important that households be configured correctly!
3. Run the **[GNRL-220] Program Details** Report for the period 10/1/21 to 9/30/22 (this report is under Program Based Reports) and review the following:

Interim VI-SPDAT Training - *Mandatory*

Interim VI-SPDAT Training - *Mandatory*

What is the Interim VI-SPDAT Training?

- The Interim VI-SPDAT Training is a supplementary training that will provide information on the engaged interview approach, the intent and scope of new questions, and details around when re-assessment should occur.
- If you do not administer the VI-SPDAT then you do not need to complete the training.

Next Steps

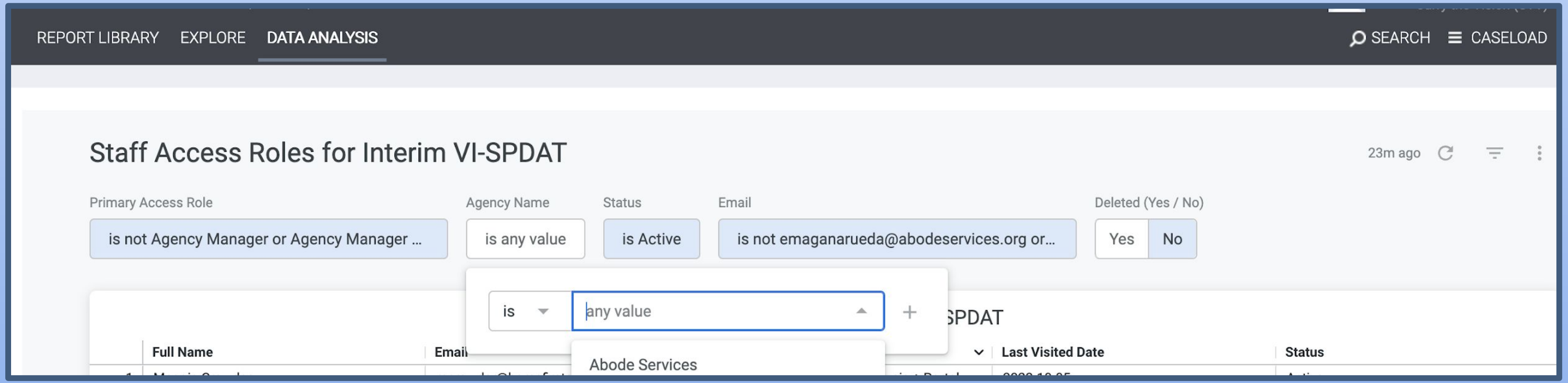
- Here is a link to the training should you need it
- If the screen appears blank you will need to Sign In (top right hand corner). Do not use your personal email address to register - we use your work/agency email to confirm completion (what is entered in HMIS)
- You must take the training without clicking off of the video - multitasking during this training is not recommended
- Deadline to complete is Thursday, October 13th, 2022 EOB

- There is a short 13 minute video you will need to watch that will be followed by a five-question quiz
- You must pass the quiz with a score of 80% or higher; you can of course take the quiz until you pass
- If you are unable to complete the training and/or pass the quiz by deadline your access will be updated so you are not able to administer and/or enter the VI-SPDAT (you will be able to view only)
- If you miss the deadline (for whatever reason) and your access is changed, it is your responsibility to contact the Help Desk - they will verify training completion and reinstate your access

Interim VI-SPDAT Training - *Mandatory*

How can I tell who needs training at my agency?

Go to the Data Analysis tab in Clarity, expand the Looks/Dashboard list under Santa Clara County HMIS Reports, and select Staff Access Roles for Interim VI-SPDAT. Add your Agency's name to the Filters at the top and click run.



This is a list of your agency staff who have not completed the training as of the morning of 10/5/22.

They have until 10/13 to complete the training. Please let us know if any of these users are exempt or if we've missed that in our records. Any users not listed in the Look have either completed the training or they are exempt.

Security Breach - *OSH Guidance & Next Steps*

Security Breach - *OSH Guidance & Next Steps*

Life happens and sometimes laptops are misplaced and or stolen, here is what you should be doing in the event this happens.

- Inform your Agency Lead/Supervisor
- Reach out to SCC OSH and let them know
  - CoC will determine next steps for reporting seriousness of breach and next steps for your agency
- Contact Bitfocus Support (sccsupport@bitfocus.com) and have your access made inactive and/or change your password immediately
- Just remember it is important to report these types of incidents immediately
- Have more questions please reach out to your CoC contact

Security Checklist - *Due, October 31st, 2022*

Security Checklist - *SCC HMIS Quarterly Compliance Certification Checklist*

Appendix B: Quarterly Compliance Checklist

SANTA CLARA COUNTY HMIS QUARTERLY COMPLIANCE CERTIFICATION CHECKLIST	☐ Quarter 1 ☐ Quarter 2	HMIS Partner Agency Name :
	☐ 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

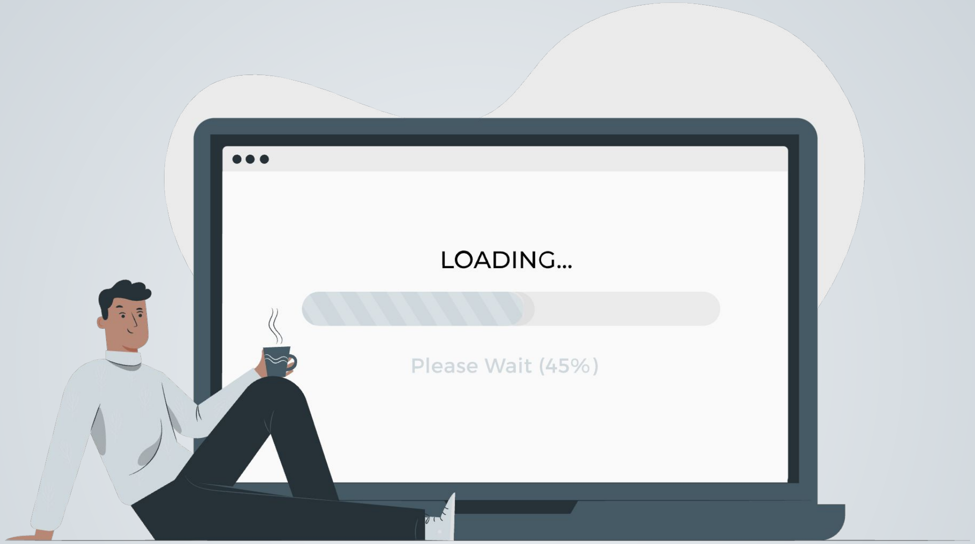
✓ Checklist is due for **NEW STAFF** added during Quarter 23 only (July - September)

✓ 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: Monday, October 31st, 2022***



Federal Reporting - *LSA Updates*

Federal Reporting - *LSA Updates*

Data Quality Has Commenced - *You may have received communication regarding the following:*

- **Geo Codes**
  - Ensure program locations have the correct city identified that matches that cities GeoCode
- **Head of Household (HoH) Error**
  - Ensure minors are not listed as HoH
  - Check that program enrollments have a designated HoH that is an adult and is still enrolled in program
- **Overlapping Enrollments**
  - Check that clients are not enrolled in two or more programs (shelter) at the same time
  - If client is in ES and in an RRH program please make sure that if there is a Housing Move-In Date, that it does not conflict with ES stay and/or exit
- **Funding Sources**
  - Verify the correct funding source is attributed to your programs
- **Program Enrollments after/before program start/end date**
  - Check that clients do not have a start date/exit date that is before a program start/end date (e.g., Program Start Date 1/1/2022 Program End Date 8/1/2022 - Client Program Enrollment 12/1/2022 or Program Enrollment End Date 12/1/2022)

Federal Reporting - *LSA Updates*

Data Quality Has Commenced - *Still to Come*

- Bed and Unit Inventory (BUI)
- NbN Shelter and Bed Night Issues
- Project Descriptor Issues
- Other Items as they present

DEADLINE FOR FIRST ROUND OF CLEAN UPS IS **10/21/2022**

Need Assistance or Have Questions?

- Drop into Office Hours every other Thursday from 10:00am-11:30am
- Need to schedule a Zoom meeting? Let us know

Connect with other Agency Leads when needed; especially around Overlapping Enrollments

- Train staff to look at a client's History Tab to help identify when they are enrolled in other ES/Housing projects to avoid overlaps
- HMIS will prompt users if they are trying to attach a housing service to a client that is already housed in another program
- When in doubt reach out - prevent erroneous data entry

Coordinated Entry (CE) Events - *Changes*

CE Events - *Changes*

Coordinated Entry (CE) Events are designated in Clarity Human Services as either “manual” or “inferred.”

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

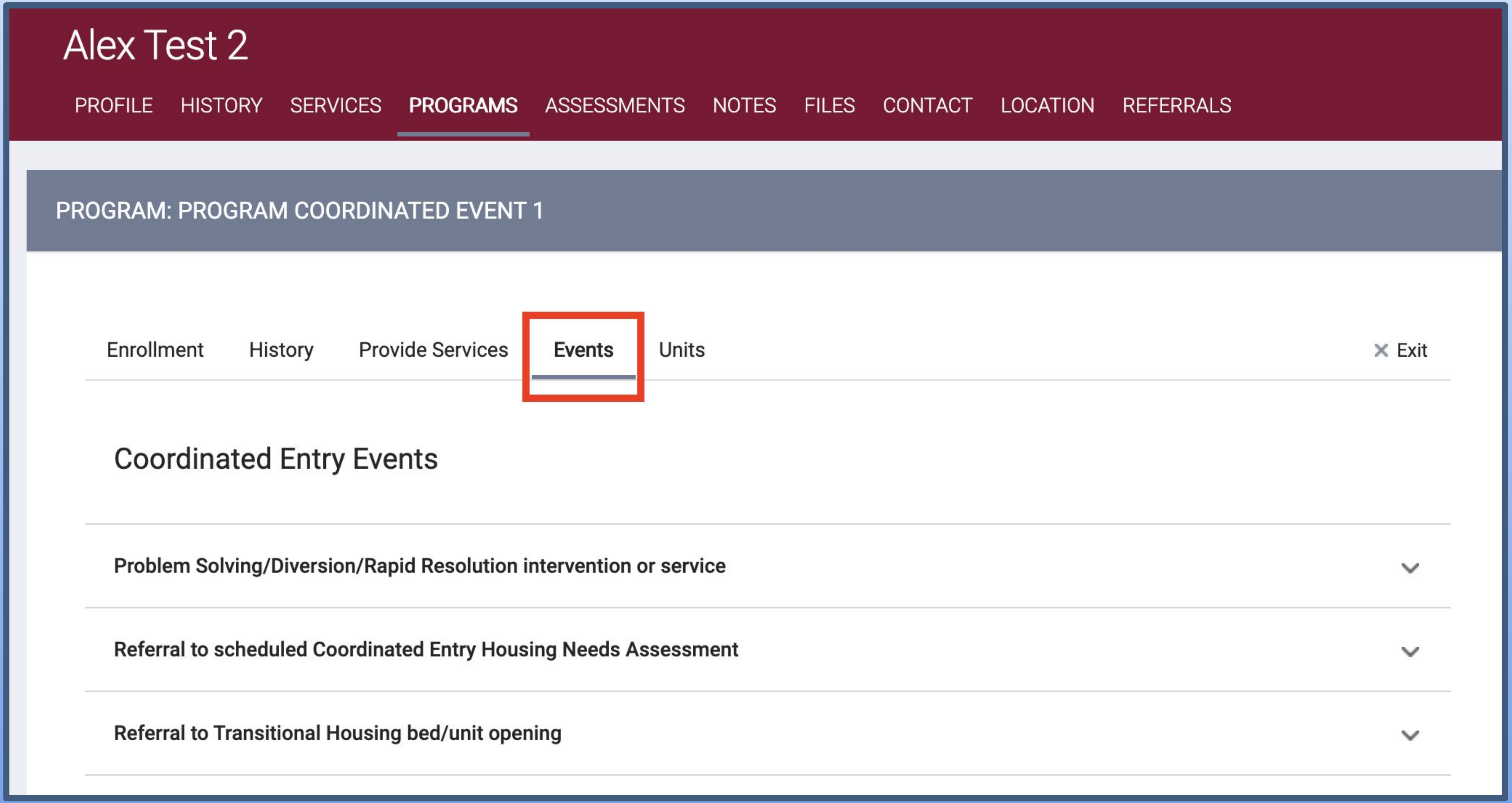
What is an Inferred Event?
These are recorded automatically by the system through referrals based on criteria such as project type or funding source (e.g., the VI-SPDAT is inferred as a CE)

What is a Manual Event?
These are recorded by the end user in the client enrollment record after they have been set-up during the program set-up

How Will These Events Be Entered?

- Once enabled end users will record the manual events through a new **Events Tab** in the client's enrollment
- This tab will be similar to the Services Tab that you are already familiar with
- These changes will allow for greater flexibility in recording CE Events and introduce the ability to import all CE Event values especially during APR reporting

CE Events - *Changes*



CE Events - *Changes*

Next Steps

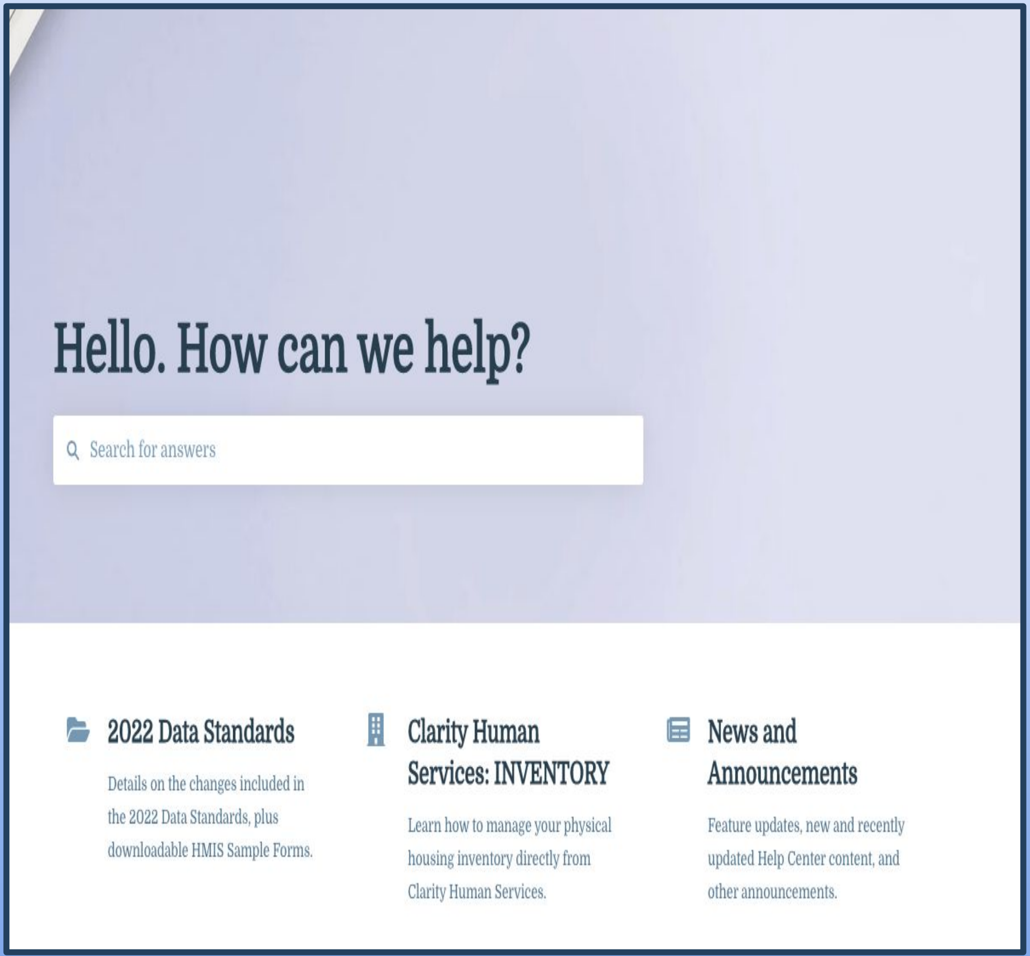
In November 2022 we expect that these changes will be implemented in Clarity. **These changes have not occurred yet.** Bitfocus will make optional training available for all agencies and staff who are impacted by this change. We will email agency leads to confirm training details when we are closer to implementation.

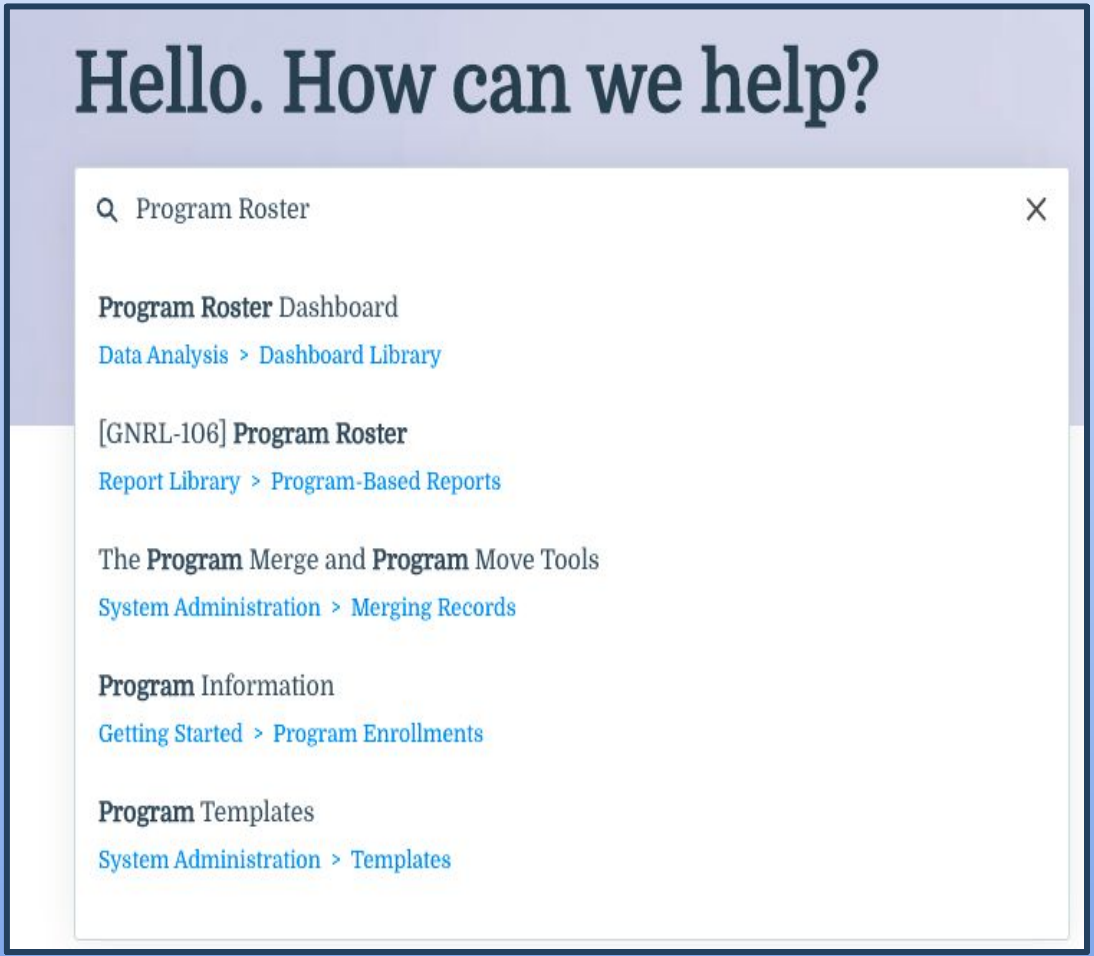
Which Agencies are impacted by this change?

- Nation's Finest
- LifeMoves
- HomeFirst
- Goodwill of Silicon Valley
- Community Hotline
- Abode Services

Reminders

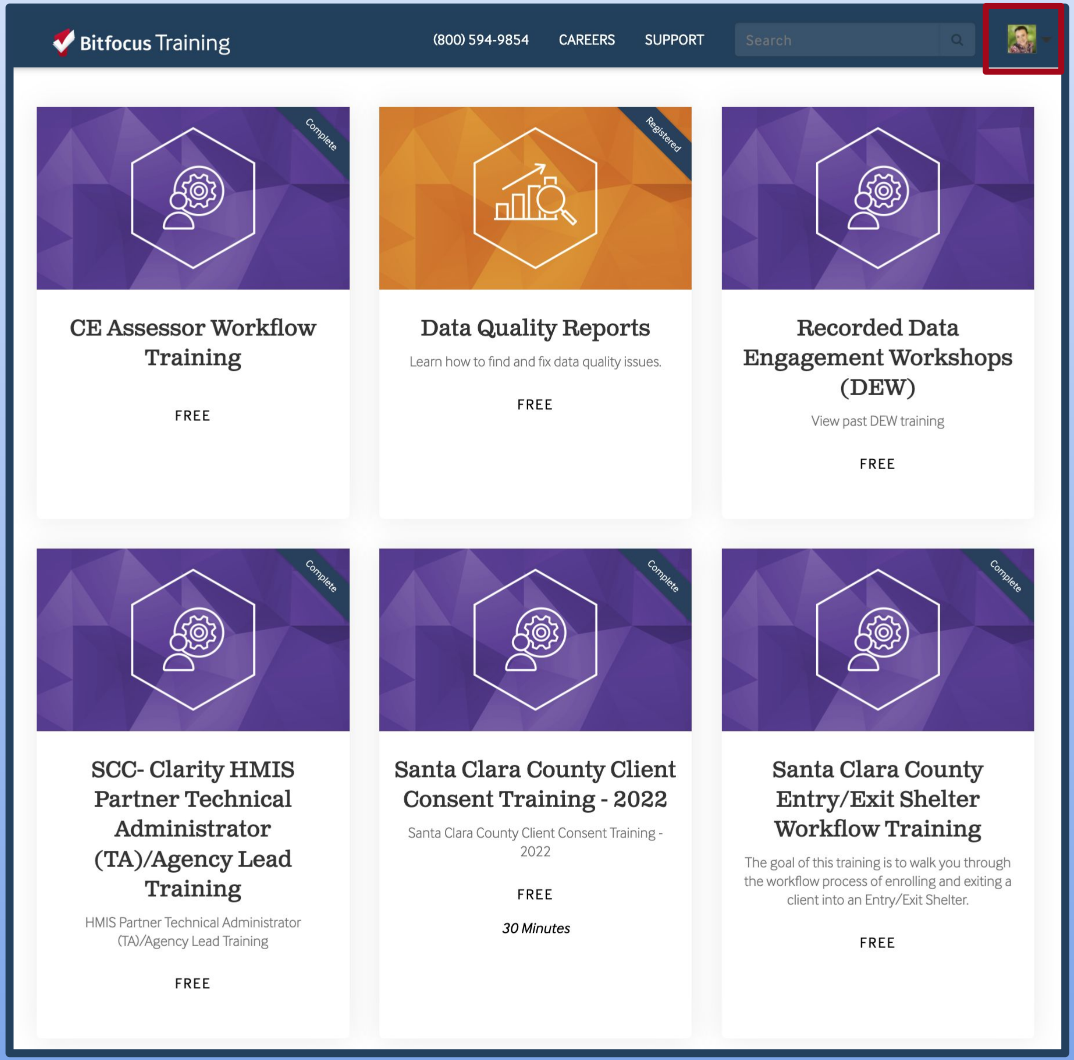
Reminder - *Clarity Human Services Help Center*





Link to page embedded in image!

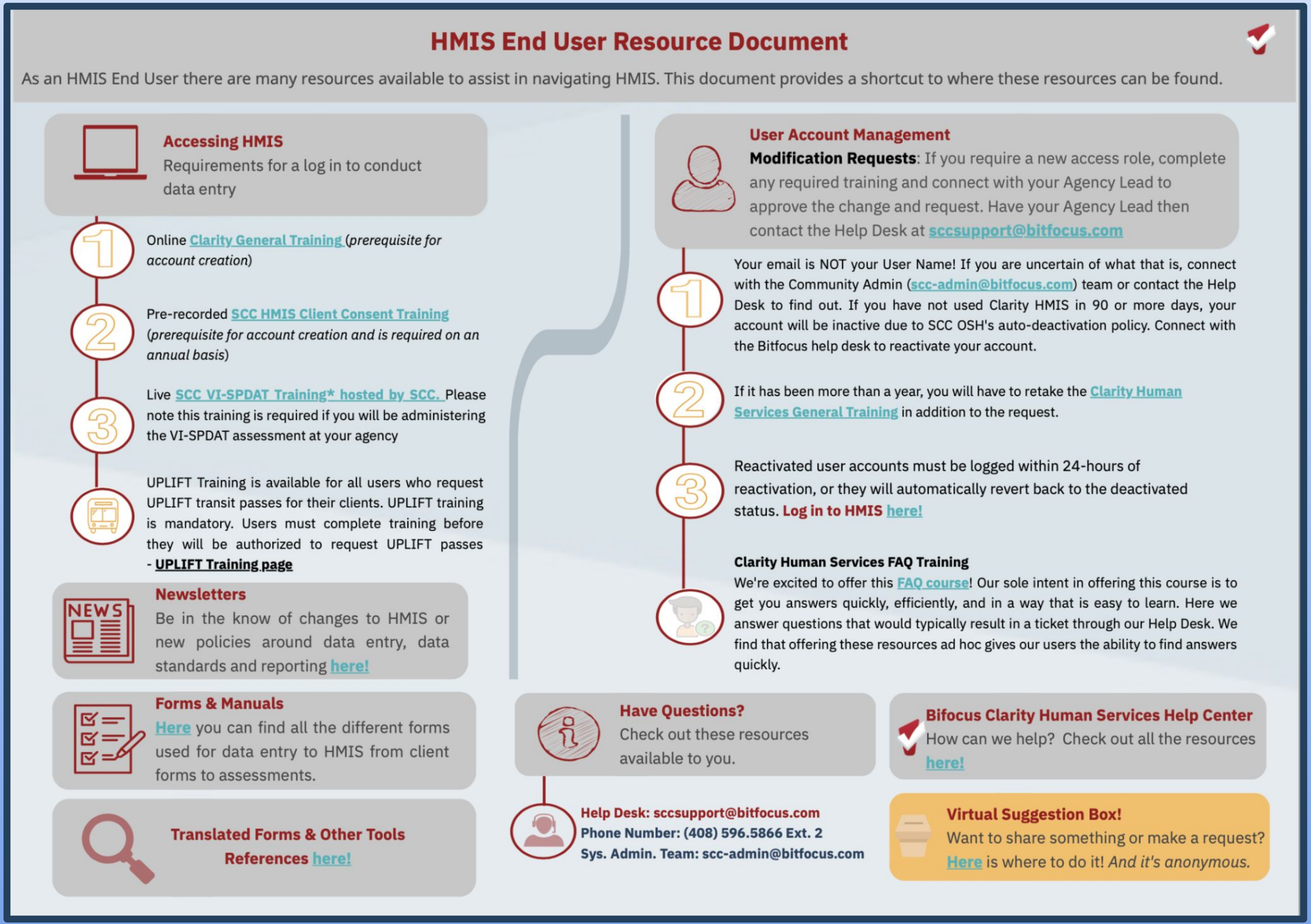
Reminder - *Clarity Training Opportunities*



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

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!

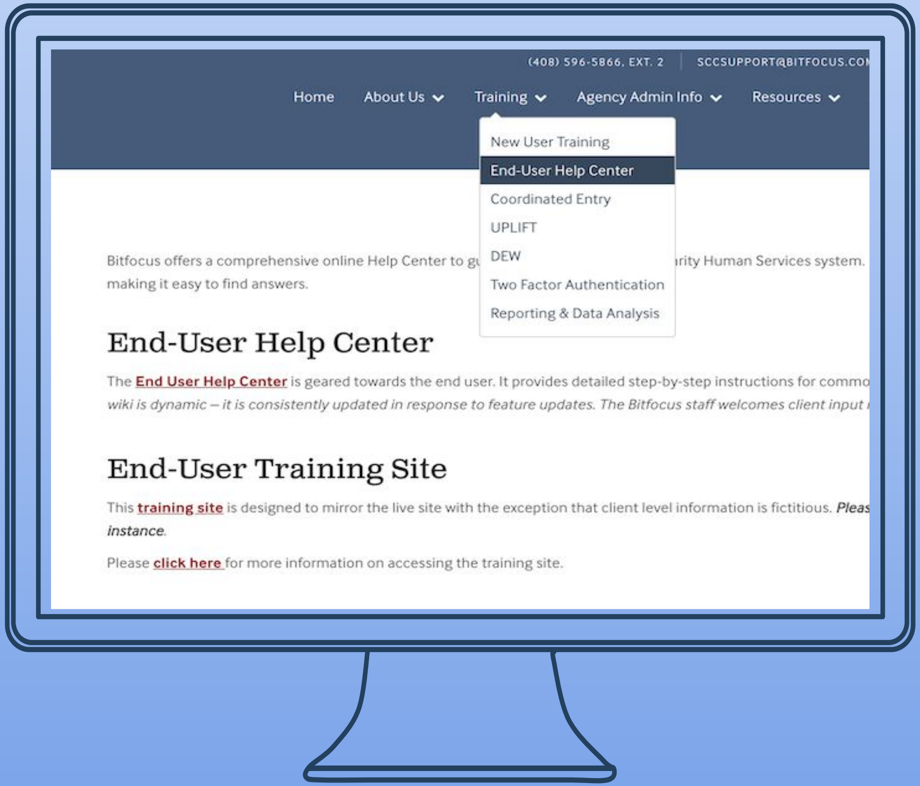
Reminders - Test Clients

- 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*

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, November 3rd, 2022