

November 2023 TA/Agency Lead Minutes



MEETING OBJECTIVES

UPDATES

- ☐ UPLIFT Updates
- ☐ HMIS Newsletter
- ☐ MyConnectSV

IN THE KNOW

- 2023 User Satisfaction Survey
- LSA Updates
- Sharing Settings
- November Feature Focus

MEMOS

- ☐ End User 60-Day Inactivation
- ☐ SCC HMIS Quarterly Compliance Certification Checklist
- ☐ Data Standards - Report Status
- ☐ Holiday Schedule
- ☐ Next Month's Meeting

UPDATES

UPLIFT Updates

Availability

- **No more UPLIFT passes available for Q2**
- 98% of UPLIFT stickers (passes) have been issued
 - The remaining 2% of passes are currently being processed; first-come, first-serve

Reminders

- We are unable to obtain additional replacement stickers (passes) from VTA
- If a client no longer needs their pass and the sticker is still *unused*, please notify us so we can reassign the sticker to another client in need
- We are still able to replace badges only (badges only usable if client already has their own sticker)

Replacements

If a replacement badge is needed, please make a request for a "Badge Only" on HMIS and notify UPLIFT@hhs.sccgov.org

Upcoming Events

| UPCOMING EVENTS NOVEMBER 2023 | | | | |
|--|----------------------------|---|--|--------------------------------------|
| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
| | | 1 | 2 2pm HMIS TA/Agency Lead Meeting | 3 CoC Membership Meeting |
| 6 | 7 | 8 9:30am Service Providers Network Meeting | 9 10am HMIS Clarity Office Hours 1pm Coordinated Entry Work Group (CEWG) | 10 |
| 13 2pm SCC HMIS Looker Office Hours | 14 10am Data Think Tank | 15 | 16 9am VI-SPDAT In-Person Training | 17 |
| 20 | 21 | 22 | 23 Bitfocus Holiday & SCC Holiday | 24 Bitfocus Holiday & SCC Holiday |
| 27 2pm SCC HMIS Looker Office Hours | 28 | 29 10am SCC TA Office Hours | 30 3pm Rapid Rehousing & Employment Initiatives Meeting | 31 |

HMIS Newsletter

November 2023 TA/Agency Lead Minutes



MyConnectSV

How can I learn more about MyConnectSV?

- Checkout the provider resources and trainings [here](#)

How can my client learn more about MyConnectSV?

- Invite them to the MyConnectSV Launch party on November 7th in St. James Park! [Click here to check out the details.](#)
- Share [MyConnectSV.org](#) with them so that they can learn how to use the new tool and what the benefits are for them!



IN THE KNOW

2023 User Satisfaction Survey

- ☐ Understanding the results of the Annual Survey
- ☐ Changes & Improvements for Next Year

What's Working and Not Working

WORKING...

- ☐ Program-based reports are most frequently used
- ☐ (Examples include Program rosters and Program Data Review)
- ☐ Next most frequently used report is HUDX-225 Data Quality report
- ☐ User's duration and experience with HMIS have remained the same
- ☐ Satisfaction with Help Desk Support and the Community Administration team remain high

NOT WORKING...

Additional training is needed for users to be more confident running reports

LSA UPDATES

What Is the LSA

- 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

What Can Your Agency Do to Prepare for the LSA

- The System Administration team may reach out to verify or correct data about your program and/or clients
- Please look out for those emails and respond promptly

November 2023 TA/Agency Lead Minutes



- We truly appreciate the hard work your community does to maintain data that is complete, accurate, and timely!

Reports to Run

- Run the [\[HUDX-225\] HMIS Data Quality Report](#)
- Run the [\[GNRL-106\] Program Roster](#)
- Run the [\[GNRL-220\] Program Details Report](#)
- Review Bed Inventories and Utilization rates for accuracy. Ensure an accurate number of beds and units are listed throughout the year for your shelter and housing programs
- Utilization rates should be between 90-105%
- For Night-by-night (NbN) Shelters, please resolve any missing exits or abandoned enrollments

Timeline

- ❑ October 1st, 2023, Reporting Year Begins
- ❑ November 1st, 2023, LSA Data Collection Opens
- ❑ November 14th, 2023 Data Quality Review Due
- ❑ November 18th, 2023, LSA Draft Deadline
- ❑ Jan 14th, 2024, LSA Final Deadline for Submission

File Sharing Settings Update

Changes to Expect in November 2023

Working with Files in the Client Record

Benefits of File Sharing

- Files uploaded to a client record can be shared between agencies or kept private
- There's no limit to the number or format of files staff members can upload

Examples of how an Agency might use this feature

- Uploading third-party documentation of homelessness
- Scanning and storing forms of client identification
- Keeping agency agreements and signed policies

- Sharing files as part of the community's Coordinated Entry process

Agency and Program Settings

- Files can be uploaded at the Program-level **or** at the Client Profile-level
- If you mark a File as PRIVATE during upload process, only other staff at your agency will be able to see that file

Adding Client Files in HMIS

The screenshot shows the 'LUKE Skywalker' interface with the 'CLIENT FILES' tab selected. A red circle highlights the 'ADD FILE' button in the top right corner. Below the button, there are two file entries: 'Personal Identification/Driver's License or State ID Card' and 'Family, Social and Legal/Alimony Agreement', both by 'Angie Evans' on '26 May, 2023'.

Adding Client Files in HMIS

The screenshot shows the 'LUKE Skywalker' interface with the 'UPLOAD A FILE' form. The 'Category' is set to 'Family, Social and Legal' and the 'Predefined Name' is 'Alimony Agreement'. A red circle highlights the 'PRIVATE' toggle, with a red arrow pointing to it and the text: 'Use this PRIVATE toggle to prevent other agencies from seeing the client file'. The 'Private' toggle is currently turned off.

Requesting Client Files using MyConnectSV

The screenshot shows the 'LUKE Skywalker' interface with the 'SEND REQUEST TO THE CUSTOMER PORTAL' form. A red box highlights the 'Documents' section, which includes fields for 'Category' (Family, Social and Legal), 'Predefined Name' (Alimony Agreement), and 'Private' (toggle). The 'Request History' table on the left shows a list of requests.

November 2023 TA/Agency Lead Minutes



Data Collection Requirements

There are no requirements around file uploads in the HUD HMIS Data Standards, however, there are limits designated by the client outlined within the Release of Information

| Client initials | Type of PPI/PHI |
|-----------------|--|
| | <ul style="list-style-type: none"> Identifying information (including: name, birth date, gender, race, ethnicity, social security number, phone number, residence address, or other similar identifying information) |
| | <ul style="list-style-type: none"> My photograph or other likeness |
| | <ul style="list-style-type: none"> Medical information included in my responses to questions asked as part of the standard HMIS intake and identification as a client or patient of the Santa Clara Valley Health and Hospital System |
| | <ul style="list-style-type: none"> HIV/AIDS-related information included in my responses to questions asked as part of the standard HMIS intake |

Version 2023_March_19

This form may not be amended or modified except on approval of the County of Santa Clara's Office of Supportive Housing. Please send all requests for changes to sccsupport@bitfocus.com.

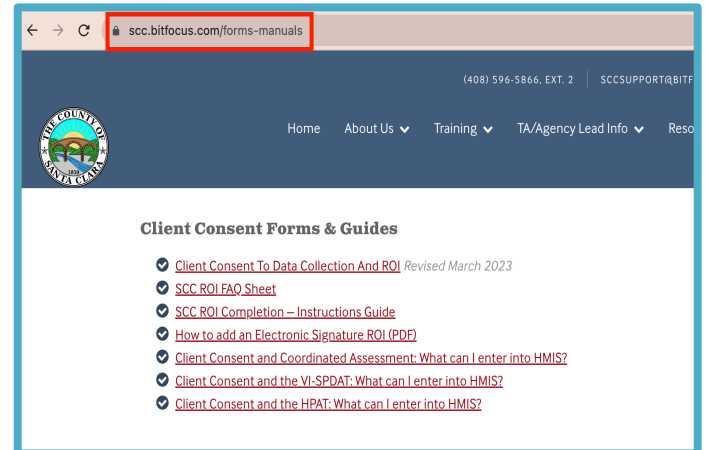
CLIENT CONSENT TO DATA COLLECTION AND ROI Page 3 of 6

| | |
|--|---|
| | <ul style="list-style-type: none"> Mental health information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving mental health services from the County's Behavioral Health Services Department |
| | <ul style="list-style-type: none"> Substance abuse treatment information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving substance abuse or alcohol treatment from the County's Behavioral Health Services Department |

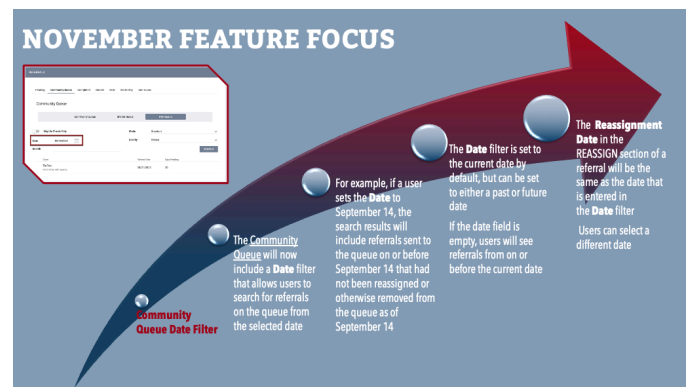
What if they don't consent to a critical subsection in the ROI?

- Update the record with a NEW RELEASE of INFORMATION form
- If necessary, make the client record anonymous

Resources



November Feature Focus



MEMOS

End User 60-Day Inactivation

NEW! Inactive User Policy

- Access disabled after 60 Days of Inactivity
- Users must log in to their account every **60 days**, or their account will be **deactivated**
- The system will notify the user by email (used in HMIS) that their account has been disabled

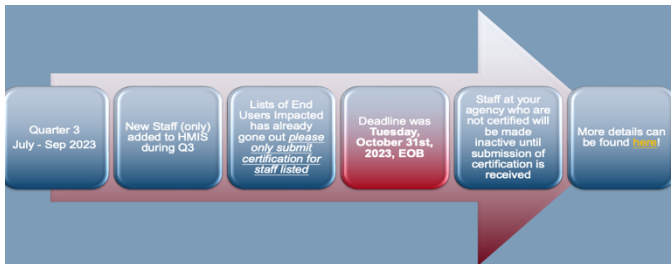
How To Regain Access

- End User can contact the Help Desk (sccsupport@Bitfocus.com) to have account reactivated
- Once reactivated by Help Desk, the user **MUST** log in ASAP, as the account will revert to inactive overnight without login

November 2023 TA/Agency Lead Minutes



SCC HMIS Quarterly Compliance Checklist – DUE
10/31/2023



DATA STANDARDS REPORT STATUS

β All Bitfocus-maintained reports with the phrase "BETA" required 2024 Data Standards updates and now conform to the new data requirements

RETIRED All Bitfocus-maintained reports with the phrase "RETIRED" still require 2024 Data Standards updates and will be updated during the month of October.

NO CHANGE Reports with no phase indication are up-to-date and did not require changes To learn more about Pentaho reports, [visit HelpDesk's article on our Report Library](#)

Custom Reports
Updated in October

Custom Report
[SCC-112] HP Outcomes Report - FY2024 Updates

Updated by end of Calendar Year

Custom Report
[SCC-107] ES/TH Utilization Report - FY2024 Updates

Custom Report
[SCC-117-AD] System Performance Measures Report [FY 2022] - FY2024 Updates

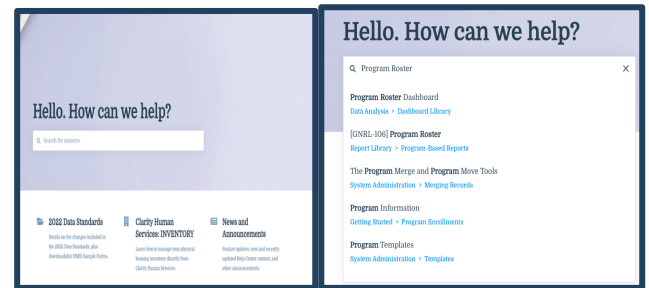
HOLIDAY SCHEDULE

Bitfocus Closed
• Thursday, November 23rd and Friday, November 24th in observance of Thanksgiving

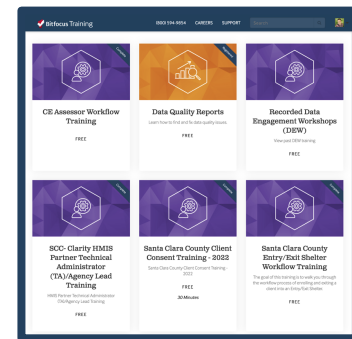
Help Desk Availability
• Skeleton Crew
• Limited Availability via Email
• Please submit requests, but be patient

Next Month's Meeting
Thursday, December 7th, 2023

Clarity Human Services Help Center



Link to page embedded in image!



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

Office Hours

Where Are Office Hours Held? Office Hours are conducted from the comfort of your own office! Each Office Hours

November 2023 TA/Agency Lead Minutes



session is hosted online by your Santa Clara County Clarity System Administration team. You can connect using your computer (recommended so that you can see demos and post questions).

Looker Office Hours

When: Every other Monday of the month Time: 2:00pm-3:00pm

[Zoom \(click here to access\)](#)

Clarity (HMIS) Office Hours

When: Every other Thursday from 10:00am-11:30am

[Zoom \(click here to access\)](#)

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 required training
3. Verifying an end user has completed required training
4. Access to the SCC HMIS Training Instance/Sandbox
5. General Assistance with reporting

How To Contact the Help Desk

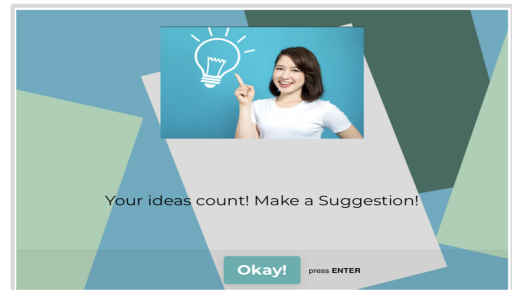
sccsupport@bitfocus.com

Or

(408) 596.5866 Ext. 2

SCC Virtual Suggestion Box

We value your opinion and insight. Please share with us your suggestions by using our new SCC Virtual Suggestion Box. You can access it by using the link above or directly from the [HMIS Support](#) page under the CONTACT tab and scrolling to the Virtual Suggestion Box option.



Have ideas about an enhancement and/or addition to HMIS?

Have any general questions you'd like to ask?

Let us know! Drop it in the box!

Next Agency Admin Meeting

Meeting Location: [Zoom Link](#)

When: Thursday, December 7th, 2023

Time: 2:00pm – 3:30pm

Dates and locations for 2023 meetings are listed on the OSH website:

[CoC Events Calendar - Supportive Housing - County of Santa Clara](#)

Bitfocus Contact Information

Support Team: sccsupport@bitfocus.com

Bitfocus System Administration Team: scc-admin@bitfocus.com

November 2023 TA/Agency Lead Minutes



Your Sys. Admin. Team:



Angie Evans

angieevans@bitfocus.com
Senior Project Admin, Santa Clara County
South Bay, CA
800.594.9854 x274



Lesly Soto Bright

leslys@bitfocus.com
Deputy Project Admin, SCC
South Bay, CA
800.594.9854 x256

List of Participants

Please note due to Zoom link updates we may have missed some of you who participated; if that is the case you can let us know and we can make the necessary updates. Thank you for your time and patience.

| Agency Name | Agency Rep. |
|--|-------------------------|
| Abode Services | Luis Gonzalez |
| Bible Way / Destiny | Aretha Cromwell |
| Bill Wilson Center | Laura Foster |
| Bill Wilson Center | Randi Rosen |
| Bill Wilson Center | Sujata Panda |
| California Youth Outreach | Anthony Ortiz Jr. |
| California Youth Outreach | Julian Delgadillo |
| Catholic Charities | Consuelo Collard |
| City of San Jose | Nathaniel Montgomery |
| CityTeam Ministries | Christopher Chamberlain |
| Community Services Agency of Mountain View | Brandi Jothimani |
| ConXion to Community | Caroline Mireles-Sailor |
| County: OSH | Fang Zhu |

| | |
|--|------------------------|
| County: OSH | Jazmine Wong |
| County: OSH | Juan Hernandez |
| County: OSH | Leila Qureishi |
| County: OSH | Steven Tong |
| County: OSH | Taylor David |
| County: Reentry Resource Center | Christian D'Alfonso |
| County: SCVHHS - BHSD - Access & Unplanned - IHOT | Lindsay Cross |
| County: SCVHHS - BHSD - AOA - FDR | Jeremy Golden |
| County: SCVHHS - Public Health | Chris Cheung |
| County: SSA - DEBS SSI Advocacy | Cassandra Brenzel |
| County: Valley Health Plan | Geralyn Glenn |
| Destination: Home | Maureen Damrel |
| Downtown Streets Team | Justin Damrel |
| Emergency Rental Assistance (ERA) | Paulina Soto |
| Family Supportive Housing | Alex Le |
| Goodwill of Silicon Valley | Laura Lozoya |
| Housing Choices Coalition | Shireen Alinani |
| Institute on Aging | Christina Strine |
| International Children Assistance Network (ICAN) | My Linh Ha-Do |
| JobTrain | Ana Rosas |
| JobTrain | Bryanna Corsbie |
| LifeMoves | Cynthia Mar |
| Mission Possible | LaTima Augmon |
| Nation's Finest | Ilaisaane Fifita |
| Nation's Finest | Kim Decker |
| North East Medical Services (NEMS) | Candido Anicete |
| Parisi House on the Hill | Ashley Orpilla |
| PATH | Aiko Yep |
| Sacred Heart Community Service | Paulina Soto (deleted) |
| San Jose State University Research Foundation (SJSU) | Jesse Mejia |
| St. Andrew's Residential Programs for Youth (STAR) | Christina Faraone |
| St. Joseph's Family Center | Jose Macias |
| Starlight Community Services | Kutlo Rasetshwane |
| Sunnyvale Community Services | Catherine Farry |

November 2023 TA/Agency Lead Minutes



| | |
|---|------------------|
| Superior Court of CA, County of Santa Clara | Roxanna Frias |
| The Health Trust: County Collaborative | Meredith Payne |
| The United Effort Organization | Wei E |
| VAPAHCS | Maria Magallanes |
| WeHOPE | Anita Blount |
| West Valley Community Services | Elizabeth Ducker |
| West Valley Community Services | Jade Bradley |