

Agency Administrators Meeting

December 7, 2017



Agenda

1. CoC / Coordinated Assessment / UPLIFT Updates
2. AHAR Submission Update
3. Document Translation Update
4. Clarity Human Services Feature Updates
5. Two Factor Authentication
6. Client Privacy Recertification
7. OSH Dashboard
8. CDQI: Data Timeliness Discussion
9. Housing Inventory Count (HIC)
10. Inclement Weather

**CoC/
Coordinated Assessment/
UPLIFT Updates**





Next Meeting: Thurs, Jan 4, from 2:30-3:30pm

Next month's Agency Administrator Meeting will be held back-to-back with the Performance Management Workgroup meeting:

1:30-2:30pm: Performance Management Workgroup

2:30-3:30pm: HMIS Agency Administrator Meeting

Location: **TBD**

AHAR Submission Update



AHAR Submission Update

AHAR was successfully submitted by the 12/1 deadline

Data was confirmed on 12/4

Next Steps:

- AHAR liaison will review and send any last questions
- HUD will determine if the data is “useable” for nationwide reporting

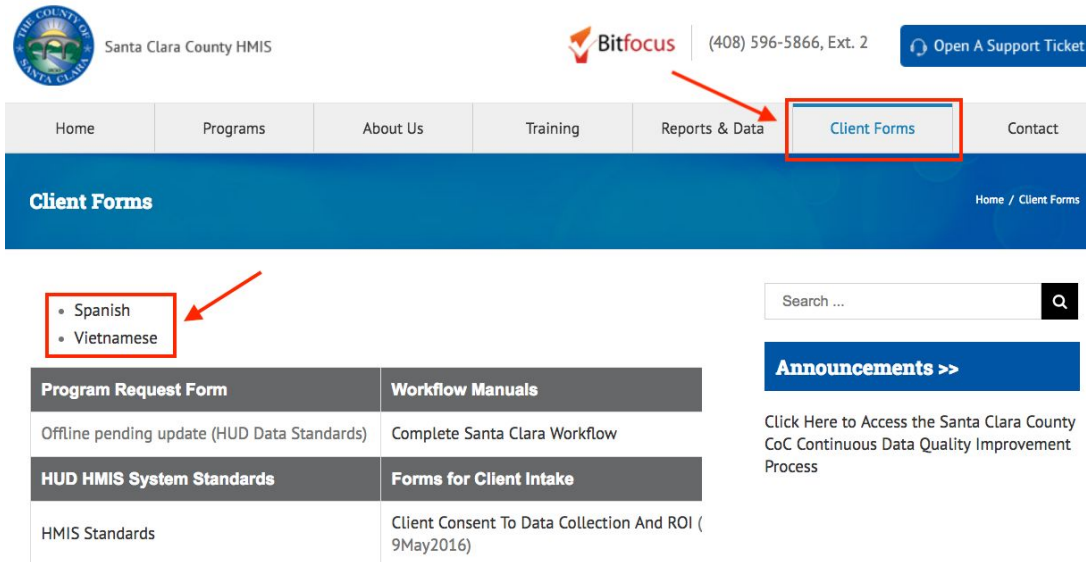
Thank you everyone for your help!



Document Translation Update

Document Translation Update

Links to Spanish and Vietnamese versions of HMIS forms are available at: <http://scc.hmis.cc/client-forms/>



The screenshot shows the Santa Clara County HMIS website. The header includes the Santa Clara County logo, the text "Santa Clara County HMIS", the Bitfocus logo, the phone number "(408) 596-5866, Ext. 2", and a button "Open A Support Ticket". The navigation menu has items: Home, Programs, About Us, Training, Reports & Data, Client Forms (highlighted with a red box), and Contact. Below the navigation is a blue banner with "Client Forms" on the left and "Home / Client Forms" on the right. A search bar is located on the right side. Below the search bar is an "Announcements >>" button. The main content area features a table of links and a language selection dropdown menu (highlighted with a red box) containing "Spanish" and "Vietnamese" (both highlighted with red boxes). A red arrow points from the "Client Forms" menu item to the language dropdown menu.

Santa Clara County HMIS

Bitfocus (408) 596-5866, Ext. 2 Open A Support Ticket

Home Programs About Us Training Reports & Data Client Forms Contact

Client Forms Home / Client Forms

Search ...

Announcements >>

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

Program Request Form	Workflow Manuals
Offline pending update (HUD Data Standards)	Complete Santa Clara Workflow
HUD HMIS System Standards	Forms for Client Intake
HMIS Standards	Client Consent To Data Collection And ROI (9May2016)

- Spanish
- Vietnamese

Clarity Human Services Feature Updates

Filter By Type On History Tab

On the History tab, there is a new filter under Advanced Search Options called "Type." You can use "Type" to filter on the client's Assessments, Programs, Referrals, and Services.

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

HISTORY

Advanced Search Options Hide ^


Search

Category Agency

Start Date End Date



Type Clear




- ✓ Any type
- Assessments
- Programs
- Referrals
- Services



Updated Label on Household Management Pop-up

In the Household Management section, the "EDIT GROUP MEMBER" pop-up for editing household information will now be labeled "EDIT GLOBAL HOUSEHOLD."

EDIT GLOBAL HOUSEHOLD  

Member Type	Husband	
Head of Household	Alex Alex	
Joined Household	10/23/2017	
Exited Household	<input type="checkbox"/>	

SAVE



Alphabetized Dropdowns

Select dropdowns on the screens have been alphabetized (example: the “Mode” filter on the Referrals tab)



Mode

- ✓ Standard
- F-SPDAT for Families (v5.2)
- JD-VI-SPDAT
- PR-VI-F-SPDAT for Families
- PR-VI-SPDAT for Single Adults
- SPDAT for Individuals (v5.2)
- SPDAT for Single Adults [v4.01]
- VI-F-SPDAT Prescreen for Families [v1]
- VI-F-SPDAT Prescreen for Families [v2]
- VI-SPDAT Prescreen for Single Adults [v1]
- VI-SPDAT Prescreen for Single Adults [v2]
- VI-Y-SPDAT Prescreen for Youths

rral Date

01/2016

OO in process

Two Factor Authentication



Two Factor Authentication Launching Jan 2018

HMIS will require Two Factor Authentication (2FA) to log in starting mid-January 2018. 2FA allows for enhanced security system-wide to reduce risk of unauthorized user access.

Tentative start date: Tuesday, Jan 16, 2018

The 2FA process will be:

- Emailed to all HMIS users later this month
- Reviewed at the January Agency Admin meeting
- Reviewed today!



First Time Logging in with 2FA

When you log in to HMIS, you will be asked whether you want to use an Authenticator App or get emailed a code



CLARITY
HUMAN SERVICES

Set Up Two-factor Authentication

How would you like to verify your account?

- Use an Authenticator App (**Most Secure**).
The next page will provide full instructions.
- Get a code emailed to:
*****@bitfocus.com

NEXT

Option 1: Using the Authenticator App

If the Authenticator App option is chosen, users will follow the instructions on the screen:

1. Download the Authenticator App onto their mobile device
2. Use their device to scan the code on the screen
3. The app will show a 6-digit code that the user will type into HMIS
4. Clicking the “Trusted Device” button means that you won’t need to enter another code for 30 days



Set Up Two-Factor Authentication

Download an Authenticator App

Android, iOS and Blackberry – **Google Authenticator**
Windows Phone – **Microsoft Authenticator**

Scan this code with the app



Enter the 6-digit code generated by the app

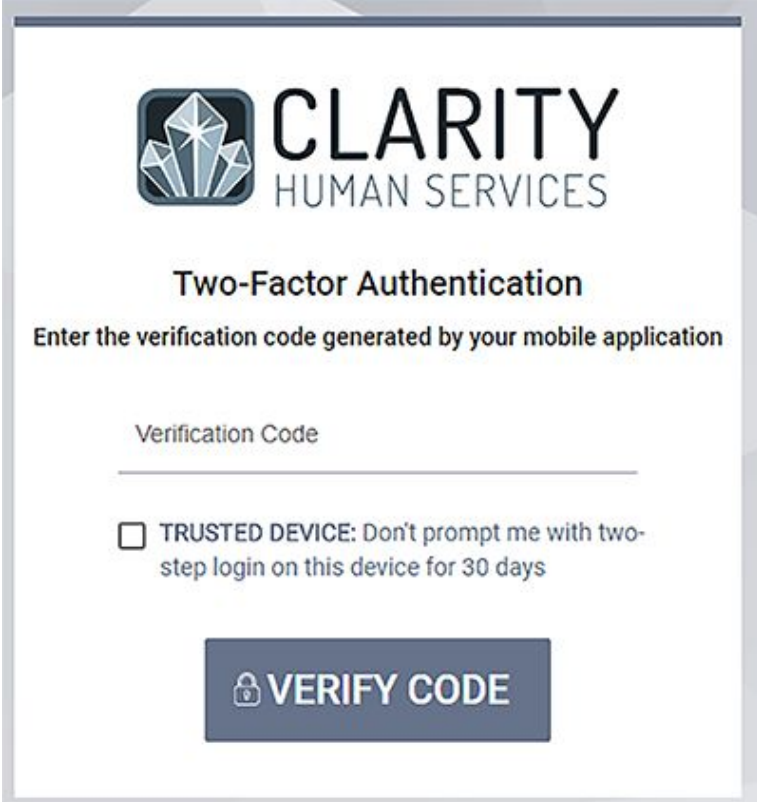
VERIFY CODE


TRUSTED DEVICE: Don't prompt me with two-step login on this device for 30 days



Option 1: Using the Authenticator App

The next time you need login in and need to complete 2FA, the screen will ask for the 6-digit code, which users can find by opening the Authenticator App on their mobile device




 **CLARITY**
HUMAN SERVICES

Two-Factor Authentication

Enter the verification code generated by your mobile application

Verification Code

TRUSTED DEVICE: Don't prompt me with two-step login on this device for 30 days

 **VERIFY CODE**



Option 2: Using Email

If the Email option is chosen, users will be emailed a verification code that they will need to enter into HMIS in order to login in



Set Up Two-Factor Authentication

How would you like to verify your account?

- Use an Authenticator App (Most Secure).
The next page will provide full instructions.
- Get a code emailed to:
*****@bitfocus.com

NEXT



Option 2: Using Email

Users will need to check their email to find the code



Dear Jenn Ong,

You recently requested to 2FA authentication code for your Clarity Human Services account.

Your code is **Look for code here**

If you did not request an authentication code, please ignore this email or contact support to let us know.

Thanks
Clarity Human Services.

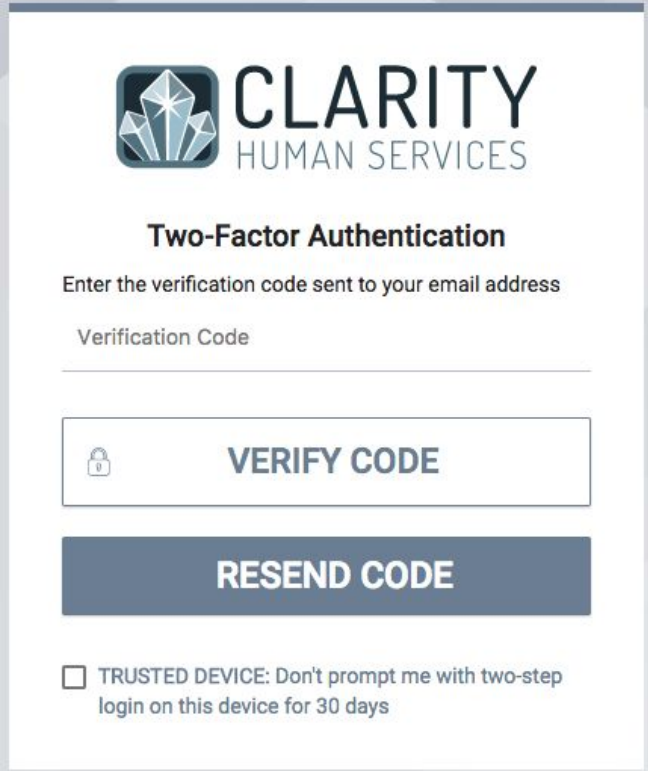
P.S. We also love hearing from you and helping you with any issue you have. Please contact support if you want to ask a question or say hi.



Option 2: Using Email

Users will then type in the Verification code

Clicking the “Trusted Device” button means that you won’t need to enter another code for 30 days



The screenshot shows a mobile application interface for Clarity Human Services. At the top, the Clarity Human Services logo is displayed, featuring a stylized diamond icon. Below the logo, the text "Two-Factor Authentication" is centered. Underneath, a prompt reads "Enter the verification code sent to your email address". A text input field labeled "Verification Code" is positioned below the prompt. Below the input field, there are two buttons: a white button with a lock icon and the text "VERIFY CODE", and a dark blue button with the text "RESEND CODE". At the bottom of the form, there is a checkbox labeled "TRUSTED DEVICE: Don't prompt me with two-step login on this device for 30 days".



How to Prepare for 2FA

- Make sure users are aware that 2FA will be required starting in mid-January
- Distribute instructions on how to log in using 2FA
- If users opt to download the Authenticator application, make sure they download the application before Jan 16th:
 - Android, iOS, Blackberry: download the Google Authenticator app
 - Windows Phone: download the Microsoft Authenticator app

Client Privacy Recertification



Client Privacy Recertification

Every year, HMIS users are required to retake the Client Consent training and recertify

Bitfocus is in the process of updating the training

Recertification will take place for all HMIS users in January:

- Users will be asked to watch the Client Consent training
- On a specific date, HMIS users will be required to fill out a recertification form the next time they log in to HMIS

Exact details will be announced at the January Agency Admin meeting

OSH Dashboard



CDQI: Data Timeliness Discussion



Continuous Data Quality Improvement Process

3 Factors for CDQI:

1. Timeliness
 - a. Transitional and Permanent Housing Programs: Enter all program entry/exit data within three (3) workdays.
 - b. Emergency Shelters and non-HUD: Enter check in/checkout within one (1) workday
 - c. Outreach: Create client profile, if necessary, within three (3) workdays. Record outreach services within one (1) workday.
2. Completeness
 - a. No missing data for required data elements. Don't Know or Refused responses should not exceed the allowed percentages
3. Accuracy
 - a. Review data to make sure it is reflects real world information

CDQI Process is posted on <http://scc.hmis.cc/>

Home Programs About Us Training Reports & Data Client Forms Contact

Santa Clara County HMIS
71,958 Clients served in 2014

Welcome to the Clarity Human Services HMIS!!
Clarity Human Services extends a warm welcome to Santa Clara County!

[READ MORE!](#)

Search ...

Announcements >>

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



Discussion: Should there be a cut-off time for data entry?

Proposal: OSH/Bitfocus needs to be informed of any entries or exits that are older than 21 days before data entry occurs

Questions:

- How do agencies feel about the proposal?
- Is 21 days the right time frame?
- What data is important to monitor?

Housing Inventory Count (HIC)



Housing Inventory Count (HIC)

The Housing Inventory Count (HIC) is conducted annually in late January

Report is on shelter and housing programs (ES, TH, RRH, PSH), including non-participating HMIS programs (e.g. DV programs) and includes:

- Bed/unit capacity
- Federal funding source
- HMIS participation
- Location (geocode and address)
- Other project details
- Utilization rate based on clients in shelter/housing during one night in January (point-in-time count)



HIC Preparation

Please review and confirm the information about housing and shelter programs that we previously reported to HUD in [THIS SPREADSHEET](#).

Although the spreadsheet may look intimidating at first glance, we are only asking you to look at a few elements:

1. The names of your program(s)
2. HUD Geo Codes for the geographic area(s) in which your program(s) operate
3. Inventory type (Current, New, or Under Development)
4. Housing Type
5. ES bed type (for emergency shelter programs only)
6. Target populations
7. Whether you receive McKinney-Vento Funding
8. Whether you receive other federal funding



Keep the following in mind while reviewing:

- Let us know if any new housing or shelter programs have come online during calendar year 2017
- Similarly, let us know if any programs on our list have stopped operating during calendar 2017
- Please leave a comment in any cell where information needs to be changed (Bitfocus will make the actual change, using the information from your comment)
- Lastly, please tell us when you have completed your review of the spreadsheet.



HIC: Client Data Requirements

- All Shelter and Housing projects will need to report the actual number of clients served on one night in January. Information will be used to calculate Utilization Rates for each project.
 - PSH, RRH, and OPH (Other Permanent Housing) Projects will be based on clients housed
 - RRH bed/unit inventory will be based on housed clients
- How you can prepare
 - Run the [GNRL-106] Program Roster and review the list of active clients
 - Exit clients who are no longer in the project
 - Enroll clients who are not yet in HMIS
 - RRH and PSH projects - Fill out the Housing Move-In Date for your housed clients
 - Housing Move-In Date should always be on or after the Project Start Date (if the client was housed at entry, use the Project Start Date)

[GNRL-106] Program Roster Report

Where to find it:

- Reports Library, Programs folder

Important Notes:

- Gives basic information about clients and households participating in the program

Program(s)

Choose...


- All
- EAP Demo Program
- Jenn Test HP Prevention Program
- RRH
- CoC Outreach
- CoC Outreach 2
- CoC Outreach 3
- CoC Outreach 4
- CoC Outreach LM
- Drop In Center
- ES - Old Standards
- ES 1
- ES Seasonal and Year Round
- ES Seasonal Test

Choose Programs


Status

Active within Report Date Range **Choose Active within Report Date Range**

Report Start Date

 **To choose current clients, use today for both the Report Start Date and Report End Date**

Report End Date

 **To choose current clients, use today for both the Report Start Date and Report End Date**

Report Output Format

Web Page PDF Excel

OK



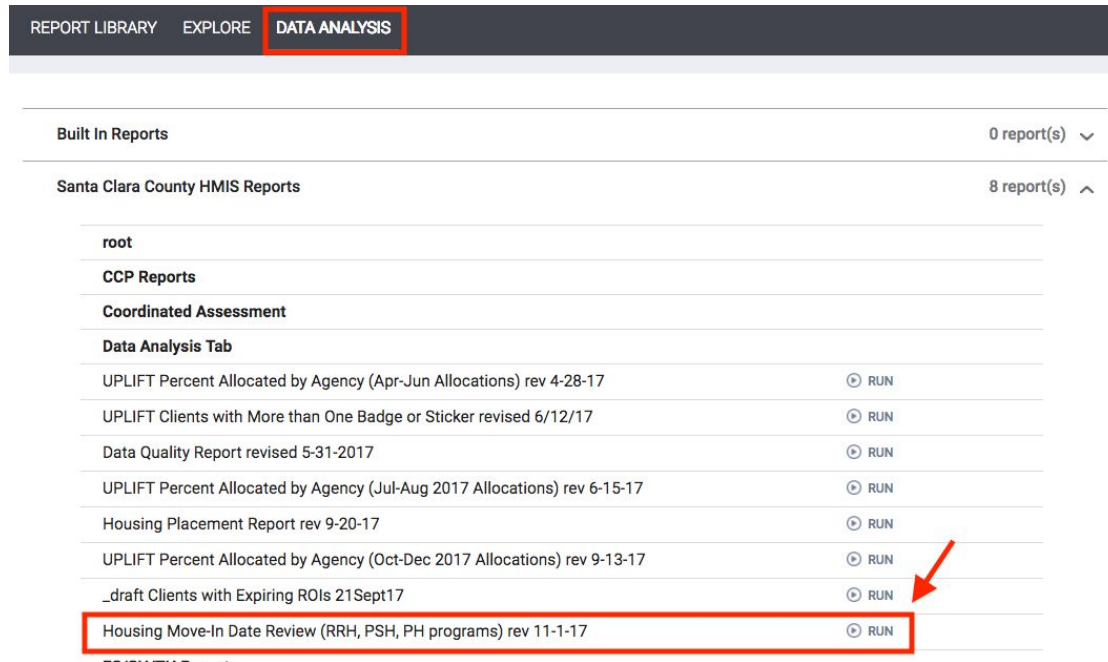
Looker Report: Housing Move-In Date Review

Where to find it:

- Reports Library, Data Analysis tab
- Available to Agency Managers

Important Notes:

- Shows Housing Move-In Date for households in a given reporting range



REPORT LIBRARY EXPLORE **DATA ANALYSIS**

Built In Reports 0 report(s) ▾

Santa Clara County HMIS Reports 8 report(s) ▴

root

CCP Reports

Coordinated Assessment

Data Analysis Tab

UPLIFT Percent Allocated by Agency (Apr-Jun Allocations) rev 4-28-17	⊙ RUN
UPLIFT Clients with More than One Badge or Sticker revised 6/12/17	⊙ RUN
Data Quality Report revised 5-31-2017	⊙ RUN
UPLIFT Percent Allocated by Agency (Jul-Aug 2017 Allocations) rev 6-15-17	⊙ RUN
Housing Placement Report rev 9-20-17	⊙ RUN
UPLIFT Percent Allocated by Agency (Oct-Dec 2017 Allocations) rev 9-13-17	⊙ RUN
_draft Clients with Expiring ROIs 21Sept17	⊙ RUN
Housing Move-In Date Review (RRH, PSH, PH programs) rev 11-1-17	⊙ RUN

Report Filters

Housing Move-In Date Review (RRH, PSH, PH programs) rev 11-1-17

Save Look

0 rows · from cache · 28m ago

Run



FILTERS

Custom Filter

Enrollments Reporting Period Filter

Conditionally Required

is in range

2017-10-01

until (before)

2017-11-01

+

Agencies Agency Name

is equal to

System

×

+

Enrollments Head of Household (Yes / No)

is

Yes

×

Programs Name

is equal to

Test

×

+

Programs Project Type Code

is equal to

PH - Housing Only

×

+

PH - Housing with Services (no disability ...

PH - Permanent Supportive Housing (dis...

PH - Rapid Re-Housing

Update date range, Agency Name, and Program Name

Review Housing Move-In Date for accuracy

VISUALIZATION

DATA

RESULTS

Calculations

Row Limit 500

Totals

Agencies Agency Name	Programs Name	Clients Unique Identifier	Enrollments Project Start Date	Enrollments Project Exit Date	Entry Screen Housing Move-in Date	Update/Exit Screen Housing Move-in Date	Housing Move-In Date
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Inclement Weather



Inclement Weather

For agencies running **Inclement Weather Programs** this winter season, HMIS can be used to track and report on clients served by those programs

Tracking data in Clarity is optional - as in past years, agencies will need to submit their Inclement Weather numbers to OSH (Michelle Covert)

If your agency is interested in tracking Inclement Weather Programs using HMIS, please contact Bitfocus. Bitfocus will automatically set up the same Inclement Weather Programs that used HMIS last year.

If your agency has **Cold Weather Programs**, you should have been notified by Bitfocus that your programs were set up in HMIS.