

# December 2023 TA/Agency Lead Minutes



## MEETING OBJECTIVES

### UPDATES

- CoC Updates
- UPIFT Updates
- HMIS Newsletter

### IN THE KNOW

- LSA – DQ Outreach
- SCC HMIS Quarterly Compliance Checklist – *Process Change*
- Coordinated Entry (CE) – Assessments Missing Referrals to the CQ – *Process Change*
- Using DocuSign

### MEMOS

- NEW MyConnectSV Feature
- Holiday Schedule
- Annual Confidential Consent Training – Updates
- Next Month's Meeting

### UPDATES

#### CoC Updates

- COORDINATED ENTRY SYSTEM (CES)

Implementation Committee has developed questions for the new assessment tool, preparing for beta testing with a pilot group of assessors across the county

- DOMESTIC VIOLENCE (DV) AGENCIES

DV-serving agencies are planning to meet quarterly to better coordinate efforts and advocacy between each other and the broader CoC

- COC BOARD UPDATES

The December CoC Board meeting will be moved to January - Date *TBD*

Omar Passons is now the CoC Board appointee for the City of San Jose

- NEW OSH CoC LEAD

*Laura Urteaga-Fuentes*

at [laura.urteagafuentes@hhs.sccgov.org](mailto:laura.urteagafuentes@hhs.sccgov.org)

Laura brings a wealth of CoC experience from her work in two communities in Michigan

### Upcoming Events – December 2023

UPCOMING EVENTS December 2023				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
				1
4	5	6	7 10am HMIS Clerks Office Hours 2pm HMIS TA/Agency Lead Meeting	8
11 2pm SCC HMIS Looker Office Hours	12 10am Data Think Tech	13 9am VI-SPD/In-Person Training 2-3pm Service Providers Network Meeting	14	15
18	19	20 10am SCC TA Office Hours	21 10am HMIS Clerks Office Hours	22
25 Bittfocus Holiday & SCC Holiday	26 Bittfocus Holiday	27 Bittfocus Holiday	28 2pm Rapid Rehousing & Employment Initiatives Meeting Bittfocus Holiday	29 Bittfocus Holiday

### UPLIFT Updates

#### UPLIFT Quarter 3, January-March 2024 Upcoming

- First day to request Q3 passes: 12/15/2023

#### Reminders for Requesting Passes

- Requests MUST be dated 12/15/23 or onward

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- Request either a "Sticker" or "Badge and Sticker" for batch 1
  - § Badge has no value on its own-each client needs a sticker
- ONLY request a "Badge and Sticker" if
  - § Enrolling a new client
  - § A continuing client has lost their badge
- Clients should be reusing their UPLIFT badges each quarter
- We can only fulfill a request for a client through one agency; duplicate requests need to be resolved by agency staff before being processed

### Error Reminders

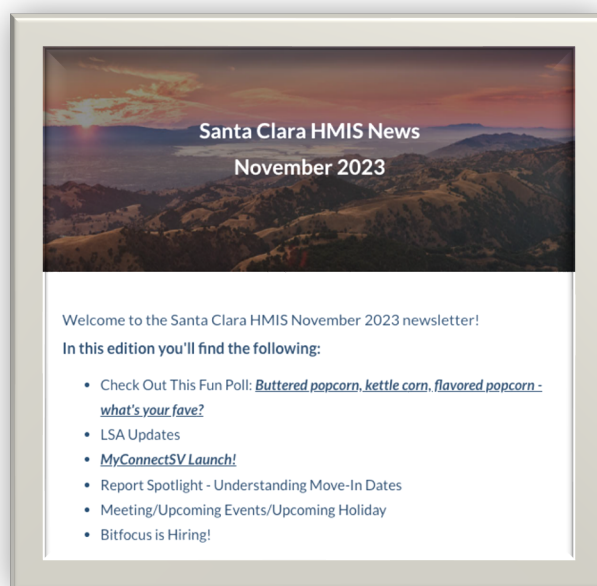
- We are continuing to track user errors-users lose UPLIFT access after 4 errors
- Common errors:
  - No photo and/or Low quality photo
  - Client's face obscured in photo (sunglasses, mask)
  - Wrong quarter selected
  - No ROI/Invalid ROI
  - Under 18

### POC Reminders

- Allocation surveys due Tuesday, 12/12/23

- Final Allocations will be sent Wednesday, 12/13/23
- Email [UPLIFT@hhs.sccgov.org](mailto:UPLIFT@hhs.sccgov.org) if the program coordinator at your agency changed

### HMIS Newsletter



### IN THE KNOW

#### LSA - Data Quality Outreach

#### What Can Your Agency Do to Prepare for 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
- We truly appreciate the hard work your community does to maintain data that is complete, accurate, and timely!
- Run the [\[HUDX-225\] HMIS Data Quality Report](#)
- Run the [\[GNRL-106\] Program Roster](#)
- Run the [\[GNRL-220\] Program Details Report](#)



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- 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

**LSA Final Deadline for Submission: Thursday, January 11<sup>th</sup>, 2024**

### SCC HMIS Quarterly Compliance Checklist PROCESS CHANGE

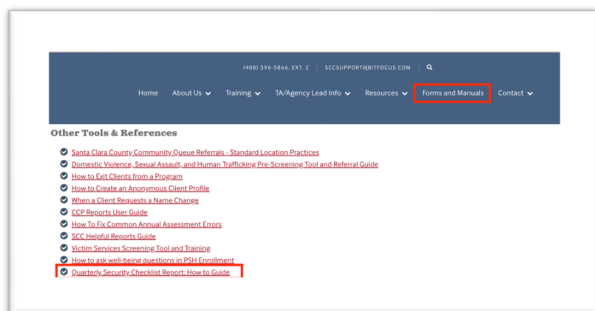
#### CURRENT PROCESS

- Email Sent informing you of End Users needing certification
- By deadline submit certification list

#### NEW PROCESS

- Email reminder sent of upcoming deadline
- You will run report in DA Tab for list of End Users
- You will send list of certified End Users to Sys. Admin. Team per usual

#### Quarterly Security Checklist Report: How to Guide



### Coordinated Entry (CE) - Assessments Missing Referrals to the CQ - Process Change

#### PROCESS CHANGE

#### CURRENT PROCESS

- Email Sent informing you of clients missing referrals to the CQ
- You or designated End User refers the clients to the CQ

#### NEW PROCESS

- Reminder of Assessments Missing Referral to CQ made monthly at TA/Agency Lead Meeting
- You will run report in DA Tab for list of clients
- You or designated End User will refer clients to the CQ

### Importance of Referring Clients to CQ: Why Refer?

- To ensure that the most vulnerable households experiencing homelessness do not miss out on supportive housing opportunities
- Coordinated entry is a consistent, community-wide intake process to match people experiencing homelessness to existing community resources that are best fit for their situation – *this cannot happen if the assessment is not referred to the Community Housing Queue*
- If the client is already on the Community Housing Queue, you'll see a note under the profile photo that reads
- "Client has an active entry on the Community Queue: Community Housing Queue"

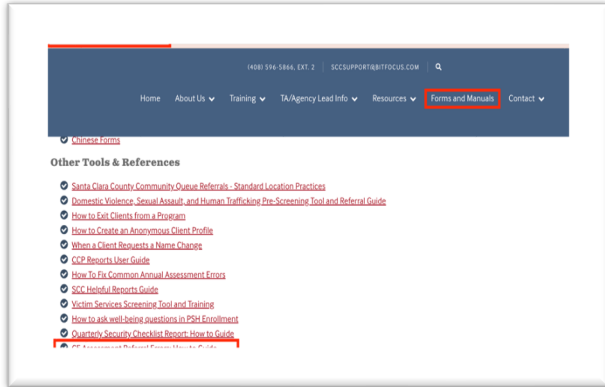
### Assessments Missing Referrals to CQ - By Agency

Agency Name	#	Agency Name	#	Agency Name	#	Agency Name	#
LifeMoves	162	Family and Children Services	7	West Valley Community Services	2	Goodwill of Silicon Valley	1
HomeFirst	39	The United Effort Organization	6	Parti House on the Hill	2	California Youth Outreach	1
PEEH	33	UPLIFT	6	Community Services Agency of Mountain View	2	Raising the Bar	1
County: SCVHHS - Ambulatory	27	Mission Possible	4	Horizon Services, Inc. - DBA Mission Street Subletting Center	2	VAPAHCS	1
County: Reentry Resource Center	18	Gardner Health Services	3	County: CDH	1	County: SCVHHS - BHSD - AGA - FDR	1
Santa Clara Family Health Plan (SCFHP)	16	Abode Services	3	County: SSA - Department of Family and Children's Services (DFCS)	1	Momentum for Health	1
Amigos de Guadalupe	16	WellHOPE	2	JobTrain	1	County: SCVHHS - BHSD - Whole Person Care (WPC)	1
Bill Wilson Center	15	County: SCVHHS - BHSD - AGA - CWS	2	New Directions - Peninsula Healthcare Connection	1	St. Andrew's Residential Programs for Youth (STAR)	1
Community Solutions	8	Midtown Family Services	2	Covenant House California	1	Please run report in DA Tab and refer clients accordingly	
Serrano Community Services	7	County: SSA - DEBS SSI Advocacy	2	County: Public Defender Office	1		
South County Compassion Center (Compassion Center)	7	Move Mountain View	2	St. Joseph's Family Center	1		

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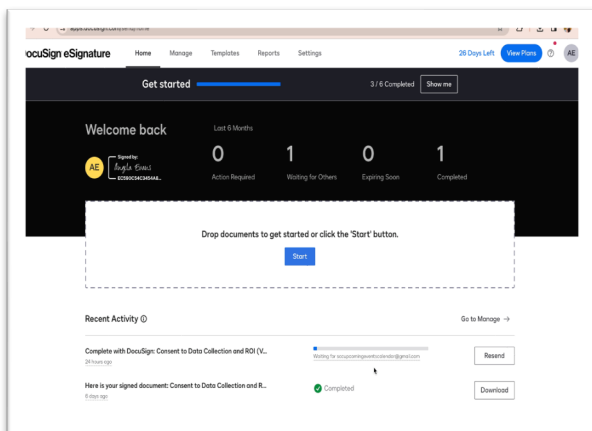
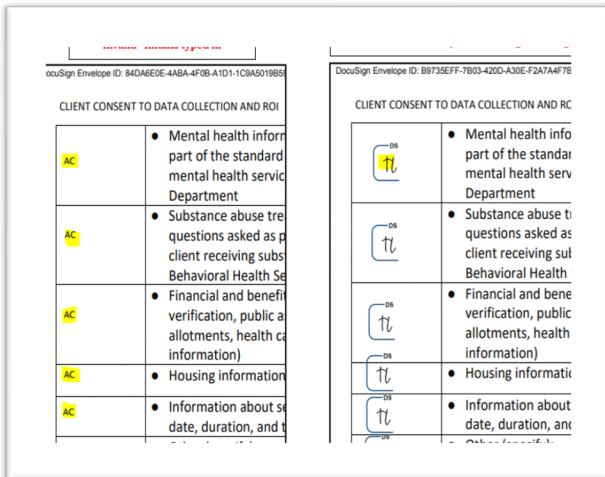


## CE Assessment Referral Errors: How to Guide



## Using DocuSign

### Sample of manually added initials vs. DocuSign



## MEMOS

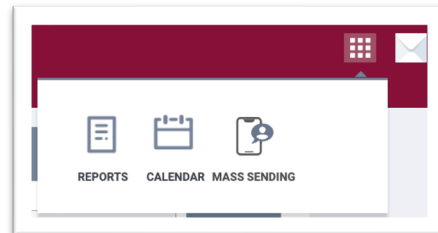
### NEW MyConnectSV Feature

New MyConnectSV Portal Features will be released on Monday, December 11!

Preliminary release—test these out and share your feedback with us to continue improving!

### MASS MESSAGES & MASS REQUESTS

- Save time by sending messages or requests to multiple clients at one time
- Send requests based on clients with MyConnectSV accounts who are actively enrolled in program(s) at your agency, previously enrolled, or search for specific clients
- Accessible to all users with Portal training completed under the new Mass Sending option in the launch pad: [screenshot below]

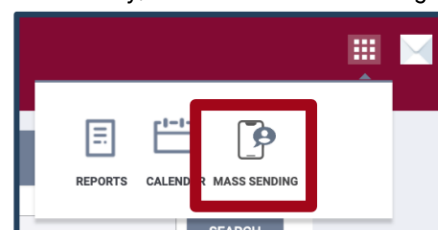


### AUTOMATIC INVITATION REMINDERS

- Invitations sent to clients to create a MyConnectSV portal account will **now expire 14 days after being sent**
- Clients will now receive automatic reminder emails 6 days and 3 days before the invitation expires

### Mass MyConnectSV Requests

MyConnectSV requests or messages to multiple clients at one time are managed through the Mass Sending functionality; which is accessed through the navigation pad



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After clicking **Mass Sending**, choose either Message or the type of mass request you'd like to send

- Document
- Assessment
- Location
- Electronic (ROI)

Details on specific types of requests are included in the next section (Feature Review).

All clients with MyConnectSV are included in the Mass Message. Use the Search bar to expand or limit the number of Clients who receive your message.

*Clients who are Active in your programs*

*Clients who are NOT Active in your programs*

*Clients by name*

Click the top toggle button to add all clients in the current list to the Selected clients list in the right pane, or add and remove individual clients by clicking the toggle next to their name

Click **Preview Mass Request** in the right pane to review and send your message or request.

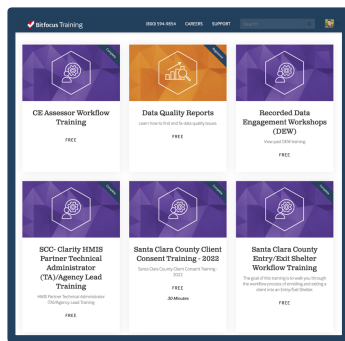
### Holiday Schedule

- **Bitfocus Closed**
  - Starting December 25<sup>th</sup>, 2023 – January 1<sup>st</sup>, 2024
- **Help Desk Availability**
  - Skeleton Crew
  - Limited Availability via Email
  - Please submit requests, but be patient

### Clarity Human Services Help Center

Link to page embedded in image!

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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 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

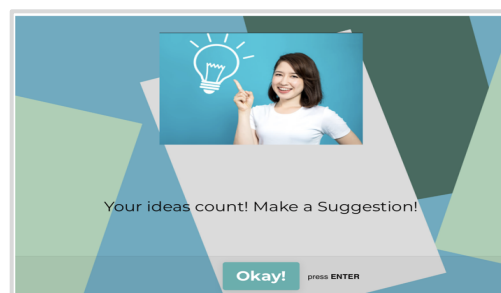
[sccsupport@bitfocus.com](mailto:sccsupport@bitfocus.com)

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!

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### Next Agency Admin Meeting

Meeting Location: [Zoom Link](#)

When: Thursday, January 4<sup>th</sup>, 2024

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](mailto:sccsupport@bitfocus.com)

Bitfocus System Administration Team: [scc-admin@bitfocus.com](mailto:scc-admin@bitfocus.com)

### Your Sys. Admin. Team:



#### Angie Evans

[angieevans@bitfocus.com](mailto:angieevans@bitfocus.com)

Senior Project Admin, Santa Clara County

South Bay, CA

800.594.9854 x274



#### Lesly Soto Bright

[leslys@bitfocus.com](mailto: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 Representative
Abode Services	Luis Gonzalez
Amigos de Guadalupe	Aurora Olivares
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.
Carry the Vision (CTV)	Renee Ridgway
Catholic Charities	Consuelo Collard
CityTeam Ministries	Christopher Chamberlain
Community Solutions	Elizabeth Reynoso-Gutierrez
ConXion to Community	Caroline Mireles-Sailor
County: OSH	Elisha Heruty
County: OSH	Fang Zhu
County: OSH	Jazmine Wong
County: OSH	Leila Qureishi
County: OSH	Taylor David
County: Reentry Resource Center	Christian D'Alfonso
County: Reentry Resource Center	Juan Guel Jr.
County: SCVHHS - Ambulatory	Rebecca Siqueiros
County: SCVHHS - BHSD - AOA - FDR	Jeremy Golden
County: SCVHHS - BHSD - AOA - FDR	Lorena Madrid
County: SCVHHS - BHSD AOA - CSI	Will Norman
County: SCVHHS - Public Health	Chris Cheung
Destination: Home	Maureen Damrel
Emergency Rental Assistance (ERA)	Paulina Soto



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Family Supportive Housing	Alex Le
Goodwill of Silicon Valley	Laura Lozoya
HomeFirst	Alisha Parret
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
LifeMoves	Daisy Navarro
Mental Health Systems (MHS)	Mike Michel
Mission Possible	LaTima Augmon
Move Mountain View	Taly Leibovici
Nation's Finest	Ilaisaane Fifita
Nation's Finest	Kim Decker
New Directions - Peninsula Healthcare Connection	Meyerlyn Sanchez
North East Medical Services (NEMS)	Candido Anicete
PATH	Aiko Yep
Sacred Heart Community Service	Paulina Soto (deleted)
Salvation Army	Owen Persons
San Jose State University Research Foundation (SJSU)	Jesse Mejia
Santa Clara Family Health Plan (SCFHP)	Andrew Somera
School Health Clinics of Santa Clara County	Jazmin Dominguez
School Health Clinics of Santa Clara County	Rose Anne Pierre
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
Superior Court of CA, County of Santa Clara	Roxanna Frias

The Health Trust: County Collaborative	Jonathan Do
West Valley Community Services	Elizabeth Ducker