

**MyConnectSV:
Santa Clara County HMIS
Customer Portal**

Provider Training

Agenda

- About MyConnectSV
- Client-Facing Functionality
 - Feature Overview
- Provider Functionality
 - Extending Invites
 - Sending Requests
 - Account Disconnection Process
- Client Support Process
- Provider Resources

About MyConnectSV



MyConnectSV is the Santa Clara
County HMIS Customer Portal

MyConnectSV Development Process



Tech Needs Assessment

Concept for MyConnectSV was a result of the [Santa Clara County Supportive Housing System Tech Needs Assessment](#)



Collaborative Development

Developed by Bitfocus in collaboration with Lived Experience Advisory Board, Destination: Home, and the County of Santa Clara Office of Supportive Housing



Lived Expertise

The project team consulted with individuals with lived experience through the development & design process



Elevating Access

Designed to elevate access and agency for individuals experiencing homelessness

Provider Expectations



Review Training and Support Materials

Review training materials provided



Provide Support to Clients

Help clients get connected & refer them to additional information and support



Send MyConnectSV Invitations Through HMIS

Invite clients through Clarity



Utilize MyConnectSV Features

Use in your case management process!

Client Support



Direct Clients to Resources

Show clients where to access client-facing instructions & videos and how to connect with the local Peer Support team.



Help Create an Account

If requested, help them create their account.



Help Escalate Any Technical Issues

If clients experience technical issues using MyConnectSV, alert the Help Desk.

Inviting Clients



Extend Invitations through HMIS

Send invitations with the click of a button through the client's HMIS profile.



Invite All New Clients to Join

Extend invites to all new clients enrolling in your programs.



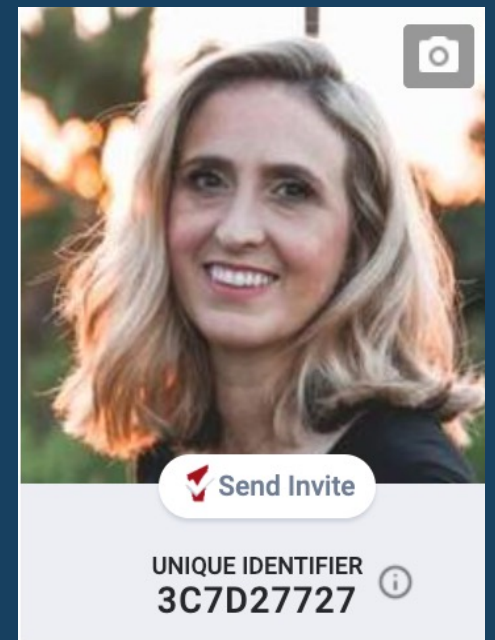
Invite as Many Existing Clients as Possible

Extend invites to as many existing clients as you can.



Share Your Excitement with Clients

Promote MyConnectSV with your clients by introducing it as a new exciting tool.



Utilize Features



Send and Respond to Messages

Check-in with clients and keep all communication organized in your Clarity Inbox.



Send Document Requests

Send requests with the click of a button through the client's HMIS profile.



Request Location Updates

Request client location at any time.



Use the Clarity Calendar for Appointments

Schedule your client appointments through the calendar so it is available for client visibility.

Feature Review: Client-Facing Functionality



What Do Clients Need to Participate?



Personal Email Account

Should not be shared in order to protect privacy and confidentiality



Access to a Personal or Shared Device

Can be accessed through a laptop, desktop, cell phone, tablet, or other electronic device
Clients can use a shared device to access



Internet Connection

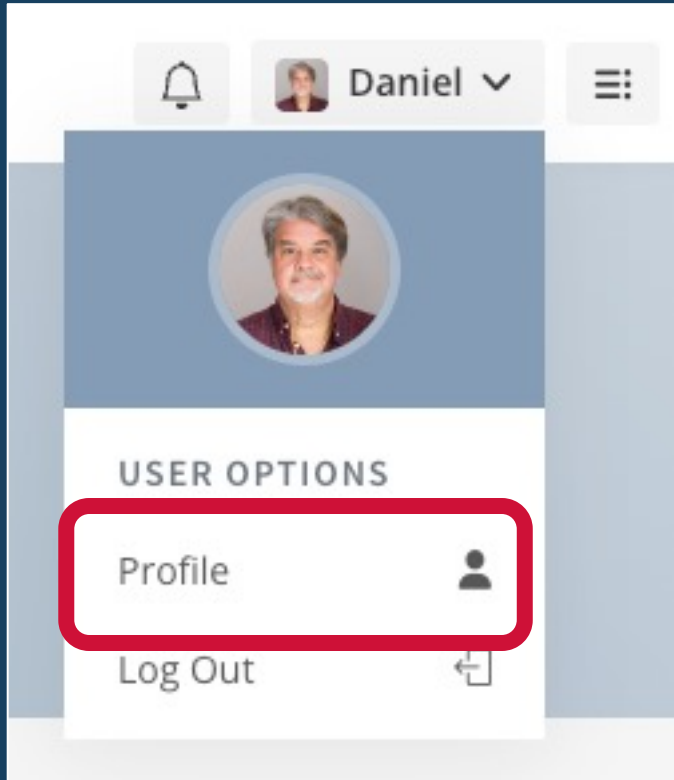
Device must be connected to the internet to access
Can be accessed from any web browser



Invitation from Service Provider

Clients must receive an invitation to join from an HMIS user
Invitations are sent through HMIS

Client Profile



Functionality Overview


- Personal contact information including name, email, and phone number
- Profile settings & controls for password, notifications, messaging, and site theme
- Client option to disconnect account

Promising Practices


- Review the contact tab to ensure client information contact is up to date
- Send a message to a care team member if contact information isn't valid


Use Instructions


- Encourage clients to review their personal information for accuracy
- Encourage clients to set their preferences at account creation
- Encourage clients to update their phone number any time a change occurs


 Dashboard


 Activity


 Assessments


 Calendar


 Community Info

 Documents

 Location

 Message Center

 Privacy

 Resource Directory

Dashboard

Dashboard: Functionality Overview

- Default home screen when client logs into MyConnectSCC.
- Display includes household members, care team members, Community Queue status, and upcoming appointments.


Dashboard: Promising Practices


- Leave care team member assignment visible
- Keep Care Team assignments current
- Send requests and messages so clients receive notifications at login


Dashboard: Use Instructions


- Encourage clients to review their household members & care team assignments


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 Assessments


 Calendar


 Community Info

 Documents

 Location

 Message Center

 Privacy

 Resource Directory

Activity

Activity: Functionality Overview

- Chronological listing of project enrollments and participation dates
- Active indicators for any current enrollments
- Household member indicators for group enrollments
- No additional access to program records

Activity: Promising Practices

- Keep your enrollment and exit records current

Activity: Use Instructions

- Encourage clients to review their activity
- Explain to clients that data is available in real time

Assessments

Assessments: Functionality Overview


- Ability to complete assessments requested by a provider through HMIS
- Only approved assessments can be requested
- Option to review previously submitted assessments
- No access to scoring or eligibility determinations


Assessments: Promising Practices


- Let clients know you will be sending an assessment and the reason for the assessment
- Offer clients the option to complete the assessment in person
- Issue a program-level assessment if the assessment is needed for program participation


Assessments: Use Instructions


- Explain to clients they will be receiving an assessment before submitting request
- Explain to clients that their responses remain confidential
- Explain to clients they have the right to request an in-person assessment
- Encourage clients to respond to requests as soon as possible


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 Assessments


 Calendar


 Community Info

 Documents

 Location

 Message Center

 Privacy

 Resource Directory

Calendar

Calendar: Functionality Overview

- View all appointments scheduled through Clarity
- Multiple display options available
- Functionality does not currently support client requests for appointments or reschedules

Calendar: Promising Practices

- Use Clarity Calendar to schedule appointments for clients with **MyConnectSCC** accounts
- Provide an address or general location in the location text field
- ***DO NOT PROVIDE ANY PROTECTED INFORMATION IN APPOINTMENT FIELDS***

Calendar: Use Instructions

- Explain to clients that appointments cannot be scheduled, canceled, or adjusted through **MyConnectSV** currently.
- Encourage clients to review upcoming appointments regularly

- Dashboard
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- Documents**
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Documents

Documents: Functionality Overview

- Allows providers to request documentation from clients
- Clients can upload pictures, screenshots, or PDFs to submit
- Clients maintain access to all previously submitted documentation
- Clients can only submit requested documentation
- Clients can only submit one photo or file per request—for multi-page documents, send the number of requests for the number of pages that the client needs to upload

Documents: Promising Practices

- Check client files in HMIS before submitting a document request
- Use to request all required documents

Documents: Use Instructions

- Explain to clients submitted documents are safely and securely stored
- Explain to clients once a document is uploaded, they cannot modify or edit it
- Explain to clients they can only upload one picture or screenshot per request
- Encourage clients to respond to requests as soon as possible

Location

Location: Functionality Overview


- Allows clients to share their location at any time
- Allows providers to request location updates
- Clients can share an address or GPS location

Location: Promising Practices


- Only extend location requests when necessary
- Message clients when you extend the location request explaining why you need to reach them


Location: Use Instructions


- Explain to clients that location requests help with providing services and ***will not be used for tracking purposes***
- Explain to clients they should add locations where they can most often be found
- Explain to clients that locations can be marked as “Inactive” if they no longer want it to appear in their location history
- Explain to clients that providers may submit location requests
- Encourage clients to respond to requests as soon as possible


 Dashboard


 Activity


 Assessments


 Calendar

 Community Info

 Documents

 Location

 Message Center

 Privacy

 Resource Directory

Message Center

Message Center: Functionality Overview


- Allows clients & care team members to send and receive messages
- Stores previous messages and responses
- Includes options for clients and providers to turn off messaging


Message Center: Promising Practices


- Use message center to manage all client communication
- Respond to client messages as soon as possible


Message Center: Use Instructions


- Explain to clients they can send and receive messages from care team members
- Explain to clients they can turn off messaging if desired
- Encourage clients to respond to messages as soon as possible
- Encourage clients to use the Message Center to request updates or information


 Dashboard


 Activity


 Assessments


 Calendar


 Community Info

 Documents

 Location

 Message Center

 Privacy

 Resource Directory

- Dashboard
- Activity
- Assessments
- Calendar
- Community Info
- Documents
- Location
- Message Center
- Privacy
- Resource Directory

Privacy

Privacy: Functionality Overview

- Allows clients to electronically sign a new Release of Information
- Prevents providers from sending multiple requests to a client
- Submitted ROIs are stored within the client profile

Privacy: Promising Practices

- Review ROIs for upcoming expiration during invitation
- Extend request for new ROI two weeks before expiration
- Message clients to explain the importance of the request

Privacy: Use Instructions

- Explain to clients the importance of ROIs for coordinating services
- Explain to clients that they cannot revise or revoke an ROI within **MyConnectSV**, but can send a message to request
- Encourage clients to respond to ROI requests as soon as possible

Resource Directory & Community Info

Resource Directory & Community Info: Functionality Overview


- Allows clients to get up-to-date local information
- View community info articles and links and filter by category
- View and filter resources by agency, category, and location
- Use a map with current location to identify nearby resources

Resource Directory & Community Info: Promising Practices


- Encourage clients to utilize the Community Info and Resource Directory to learn more about local resources and information


Resource Directory & Community Info: Use Instructions


- Explain to clients that resources and articles will be updated regularly and can be reviewed often to stay up-to-date
- Explain to clients that they can check the “Last Updated” date for each resource or article to identify new and updated information


 Dashboard


 Activity


 Assessments


 Calendar


 Community Info

 Documents

 Location

 Message Center

 Privacy

 Resource Directory

Client Functionality
Demo



Provider Functionality & Workflows



MyConnectSV Invitations

Verify Eligibility

- 18 years of age or older
- Consent to participate
- Active Release of Information (ROI)

Verify Identity

- Confirm Full Name
- Confirm two identifying pieces of information:
 - DOB
 - Phone Number
 - Address
 - SSN
 - Recent Service History
 - Photo
 - HMIS ID Number

Send Invitation

- Send Invite through client HMIS profile
- Invitations must be responded to within 7 days
- Resend invitation at any time

Points to Emphasize with Clients

- ✓ **Designed to Increase Access**
New tools designed to give more control!
- ✓ **Developed in Collaboration**
Developed in collaboration with individuals with lived experience of homelessness.
- ✓ **Secure Connection**
Developed with the security of individuals and their personal information in mind.



Restrictions

DO NOT use MyConnectSV to share the following information:

- ⊘ Health Care Information or Health Status (HIPPA)
- ⊘ Alcohol & Drug Abuse Treatment Information
- ⊘ Domestic Violence Status or Program Information
- ⊘ Citizen, Residency, or Immigration Status
- ⊘ Financial Accounts or Credit Scores
- ⊘ Education Records

Invitation Demo



Sending Requests and Messages

Send requests or messages to a client's MyConnectSV account through their Clarity profile

The image shows a user profile interface. On the left, a profile card for a man with grey hair and a beard is shown. Below the photo is a 'Connected' status indicator and a unique identifier '8F425AD2A'. A red box highlights the 'SEND MESSAGE' button at the bottom of the profile card. To the right, a 'Household Members' section contains a red box around a mobile phone icon, with a red arrow pointing to a modal window. The modal window is titled 'SEND REQUEST TO THE CUSTOMER PORTAL' and contains three dropdown menus: 'Assessments', 'Documents', and 'Location'. The modal also has a close button in the top right corner.

Sending Requests Demo



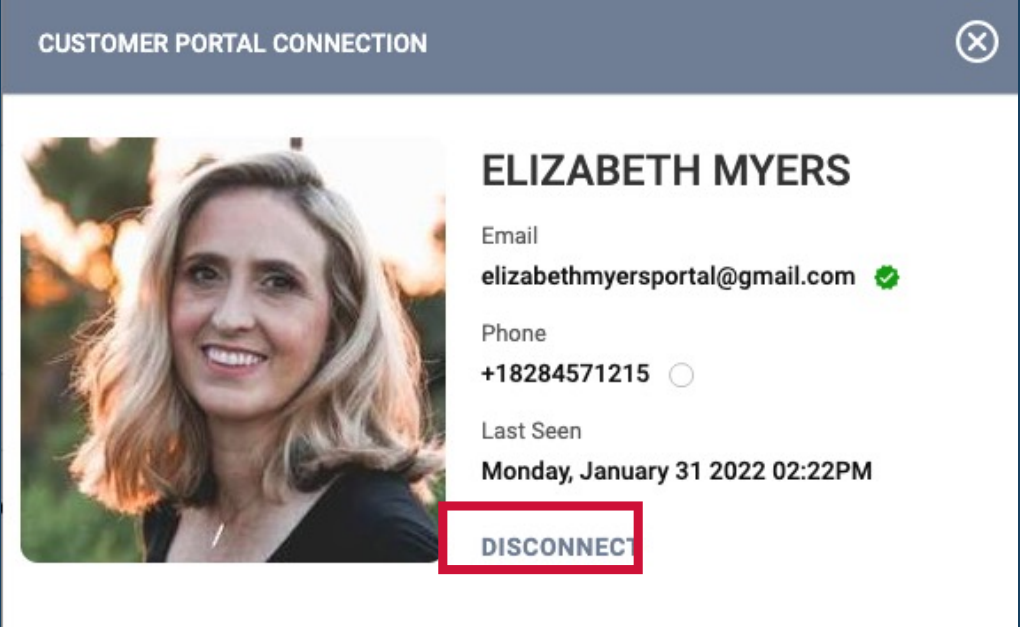
Account Disconnection

Clients or their providers should disconnect an account immediately if any of the following occur:

- Client lost access to personal email
- Client's personal email is compromised
- Client has changed their personal email address
- Account is compromised

Account disconnection suspends access to a client's personal information within MyConnectSV.

If a client has only forgotten their MyConnectSV password and their email has not been compromised, they can use the "Forget Password" button on the login page to receive a link to reset their password.



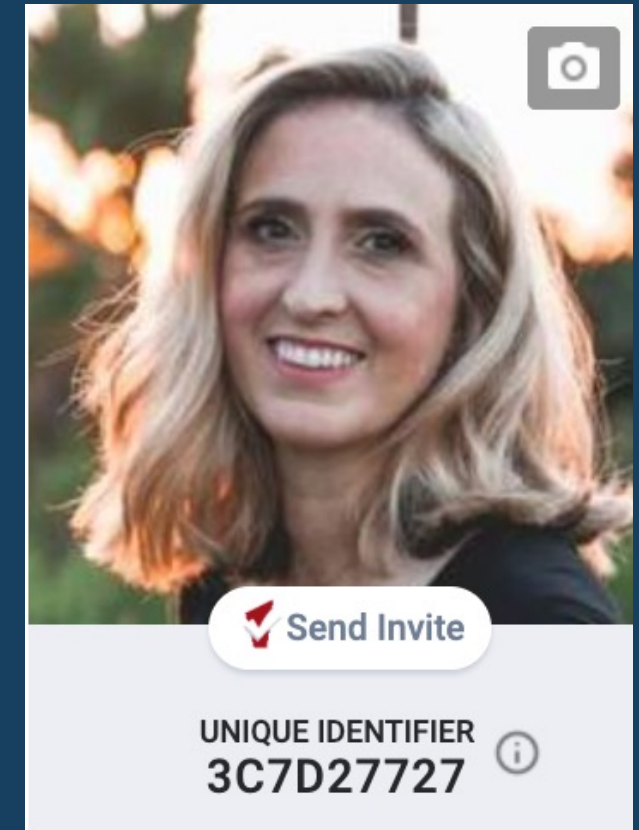
The screenshot shows a 'CUSTOMER PORTAL CONNECTION' window with a close button in the top right. On the left is a profile picture of Elizabeth Myers. To the right of the photo, the name 'ELIZABETH MYERS' is displayed. Below the name, the following information is listed: 'Email elizabethmyersportal@gmail.com' with a green checkmark, 'Phone +18284571215' with an empty radio button, and 'Last Seen Monday, January 31 2022 02:22PM'. A red box highlights a 'DISCONNECT' button at the bottom right of the profile information.

Account Reconnection

If an account has been disconnected due to a client losing access to their email account:

- Encourage client to create a new free email address
- Send an invite to a client's new email address using the same method used to invite the client for the first time

All information is saved, and clients will have access to their information once the account is reconnected to the new address.



Account Disconnection Demo



Support Process & Resources



Client Support Process

MyConnectSV Introduction

- Provide client with promotional flyer resources
- Share benefits of utilizing MyConnectSV

Account Creation

- Confirm eligibility & Consent
- Direct client to resources
- Send invitation
- Offer assistance if needed

Account Utilization

- Direct client to training resources
- Explain how you intend to use MyConnectSV
- Encourage clients to explore MyConnectSV
- Connect clients with the Peer Support team for additional assistance

Client Resources

MyConnectSV Promotional Flyer

Promotional flyer with FAQs and links to more information can be requested through Destination: Home.

MyConnectSV Client Guide

[Comprehensive guide](#) including instructions and recommended uses for features.

Instructional Videos

[Access to multiple short instructional videos](#) that cover the account creation process and feature review.

Provider Resources

Provider Manual

Comprehensive guide including provider and client instructions, recommendations, and promising practices available at scc.bitfocus.com

Access to Training Session

Access to training sessions through training.bitfocus.com

Office Hours

Attend regular Santa Clara County HMIS Clarity Office hours for further assistance or to ask questions (calendar available at <https://scc.bitfocus.com/events>)