Client Portal - *Answering Your Questions Agency Admin Meeting: May 4, 2023*

Inviting Your Clients

- If you participated in the BETA, you can invite clients now!

- Agencies waiting to be connected
    - ✓ Inviting their existing clients as part of the roll- out
    - ✓ Invite new clients as part of their intake

- **What do clients need in place?**
    - ✓ Email account they can access
    - ✓ Access to internet and a device
        - Smartphone, computer, tablet (personal or shared is ok)

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Updated ROI

SANTA CLARA COUNTY HMIS
CLIENT CONSENT TO DATA COLLECTION AND RELEASE OF INFORMATION

THIS NOTICE DESCRIBES HOW INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY

The Santa Clara County Homeless Management Information System ("SCC HMIS") is a shared database and software application which confidentially collects, uses, and shares client-level information related to homelessness in Santa Clara County. On behalf of the Santa Clara County Continuum of Care ("CoC"), SCC HMIS is administered by the County of Santa Clara ("County") and Bitfocus, Inc. ("Bitfocus") in a software application called Clarity Human Services ("Clarity"). Clients must consent to the collection, use, and release of their information, which helps the CoC to provide quality housing and services to homeless and low-income people.

Client information is collected in SCC HMIS and released to housing and services providers (each, a "Partner Agency," and collectively, the "Partner Agencies"), which includes community based organizations and government agencies. Partner Agencies use the information in SCC HMIS: to improve housing and services quality; 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 delivery, impact, and quality of housing and services.

Client information is protected by limiting access rights to the database and by limiting the parties to whom the confidential information may be released, in compliance with federal, state, and local regulations governing the confidentiality of client records. Each person or agency with access rights to SCC HMIS, or to whom client information is released, must sign an agreement to maintain the security and confidentiality of client information. Upon any violation of the agreement, access rights may be terminated, and the person or agency found to be in violation of the agreement may be subject to further penalties.

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SOP Update

Section 20: Electronic Customer Portal Access

The Customer Portal ("The Portal") is software that connects clients to SCC HMIS. Authorized clients may access a portion of their HMIS Record through the Customer Portal.

Identity Verification: Prior to sending a portal invitation the client identity and contact information will be verified by the Partner Agency. Clients will be required to share their full date of birth in HMIS prior to accessing the portal. To verify client identity agencies should ask for the individual's full name and confirm two identifying pieces of information. Identifying information may include: date of birth, contact phone number or address, social security numbers, photo, recent service history, HMIS id number, or other individualized information in the client record. Agency staff will verify the client email listed on the Contact tab in Clarity matches the Email registered to the portal account.

Authorized Access: Only the individual identified in the client record is authorized to access the Customer Portal account. Individuals must be aged 18 or older to access the Customer Portal. If the Customer Portal account is accessed by any unauthorized individual the account should be immediately deactivated. Accounts may be reinstated once the client identity and credentials are verified. An authorized individual may request to have their portal account deactivated at any time.

Portal Information and Communication: Partner Agency Staff will respond to direct messages, requests, and information sent through the Customer Portal in a timely manner. Partner agency staff will review and update information entered through the portal to ensure an accurate and complete client record. Information entered through the Portal is identified in Clarity with a portal icon.

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Support for You - Available Resources

These resources are available now

- **Staff Training**
  - ✓ In person
  - ✓ Recorded Video
  - ✓ Print out

- **Bitfocus Help Desk**
  (sccsupport@bitfocus.com)
- **HMIS Office Hours** (Every other Thursday from
  10-11:30am)

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Support for Clients - Available Resources

Trainings for Clients

- ✓ In person,
- ✓ Recorded Video
- ✓ Printout
- ✓ Trained staff at Agencies

Establishing a Peer Support Partner

- ✓ Late Summer/Fall 2023
- ✓ [LEAB website: Customer Portal page](#)

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What is Possible Now

✓ Update your contact information

✓ Update your location so your Case Manager can find you for services

✓ Message your Case Manager and other service team members

✓ Electronically sign your ROI and other documents

✓ Upload documents (e.g. copy of your ID or pay stubs)

✓ Access a resource directory

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What We are Exploring for the Future

Providing their assessment scores/ range

➢ Understanding the Coordinated Entry System

➢ Portal does not replace Care Team

➢ Avoid re-traumatizing people

➢ Bulk Messages

➢ Assessments

➢ Invitations

➢ Resource directory in HMIS

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Opportunities for Deeper Engagement

If you're excited about this shift in access and service, or know someone who might be, JOIN US!
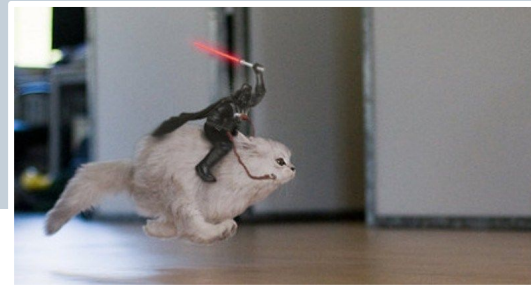
People with Lived Experience of Homelessness and Direct Service Providers

- Working Group: Every other Tuesday 11am-12pm Virtually

- Join the Interest List
    - ✓   Invites to focus groups, events, and other cool things

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Questions?

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