
Welcome to the Marin County HMIS April 2024 newsletter!

**In this edition you'll find the following:**

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## Upcoming Events

### HMIS Agency Leads Meeting*

**Wednesday, May 15, 2-3 p.m. | *Agency Leads Only: Register HERE**

We are asking the designated HMIS Agency Leads and Security Officers to join this meeting on a bi-monthly basis. Of course, if you absolutely cannot make it, please send a representative. Workgroup participants will support communications between the county, Bitfocus and agency staff with regards to community initiatives, training, privacy, security, program and data management.

## News

## Coordinated Entry and VI-SPDAT Access

Do you need to administer VI-SPDAT assessments? Do you have access to the Coordinated Entry Agency? Here's how to get access if you don't already have it.

Users who will be doing work related to Coordinated Entry, including administering VI-SPDATs, are required to complete one or more of the Coordinated Entry training(s), depending on their role with Coordinated Entry, before they will be granted access to the Coordinated Entry Agency. There are 3 trainings that can be found on the **Coordinated Entry Training page**, along with other helpful training documents and reference materials for the Coordinated Entry process in Marin.

- **Assessor Training** - must be completed by users who will be administering the VI-SPDAT assessments.
- **Provider Training** - must be completed by housing staff who will be processing referrals made to their housing or shelter programs.
- **Matchmaker Training** - only users who will be making referrals to programs during case conferencing (as part of Coordinated Entry) will need to complete this training. **Note: there are a limited number of matchmakers in Marin. Most users with this level of access and who complete this workflow are Marin Housing Authority staff.*

Users should inform their **Agency Lead** once they have completed the applicable training. The Agency Lead will then need to request additional agency access to the Coordinated Entry Agency by contacting the Bitfocus Help Desk at **marin@bitfocus.com**. *Please note that a user must have basic access to their agency in the HMIS before they can gain additional access to the Coordinated Entry Agency.*

# Clarity Human Services Updates

## Client Record URL Now Contains Client’s Unique Identifier

The URL for a client’s record now contains the client’s **Unique Identifier** (UID). Users can edit the URL to navigate to another client’s record instead of returning to the search page.


If a client’s record has been merged with another client’s record, and a user enters the first client’s UID into the URL:

- The system directs the client to the merged record.
- The URL is automatically changed to show the UID of the merged record.

The old URLs with the previous General ID will be maintained for at least six months after release.

# How-to

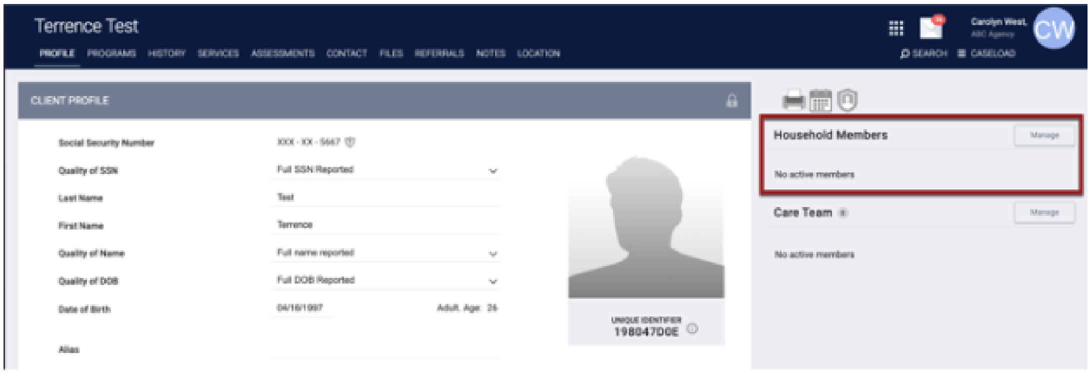
## Managing Households and Program Enrollments

Identifying families in the HMIS is done by creating and managing households. Having family members linked appropriately allows users to do the following:

- See who the members of the household are
- Correctly identify the Head of Household
- Complete accurate data for federal reports
- Create accurate rosters for housing and other programs

### Adding Household Members

Let’s start with the basics. The first step to Household Management in the HMIS is **adding Household Members** from the client profile. By default, a newly created client record will not be associated with a Household. When you are on any tab within a client record, you will see the Household Members section at the top of the right sidebar. This section contains a Manage button and a list of any active Household members associated with the client record.




Continue reading

## Clarity Human Services Updates

## Clarity Toolbox: Duplicate Clients and Duplicate Enrollments

As part of continued efforts to increase data quality, we wanted to highlight how to address the most common, and avoidable (!), mistakes we encounter when reviewing system-wide data quality.

### How to find duplicate clients

You can use the **[DQXX-110] Duplicate Clients** report to help you identify when your clients have duplicate profiles *within the agency(ies) that you have access to*. See the report spotlight below to find out more about this report!

### How to correct duplicate clients

If you find duplicate clients and need to have them merged please reach out to the Helpdesk at **marin@bitfocus.com** to request the merge. Be sure to let us know the following:

- The unique IDs of the two (or more) clients who need to be merged (never send identifying information via email!)
- Which client is the "primary" client. Although all enrollment, service, coordinated entry and other information about duplicate clients will be merged together, we can only keep one client profile. The primary client is the one whose profile we want to keep (usually this means it has more complete information than the other profile).

**How to find duplicate enrollments**
Duplicate enrollments can happen for a variety of reasons:

- When duplicated clients are merged together, enrollments for both clients are assigned to the remaining client, which can result in duplicate enrollments.
- Returning clients are enrolled with incorrect start dates, making it look like two separate enrollments are duplicate enrollments.
- Start or end dates on an enrollment get edited to overlap each other.
- Rather than removing an exit date to re-open an enrollment, users sometimes create a new enrollment with the same or similar start date.
- Multiple staff entering enrollments for clients without checking the client's history to see whether they've already been enrolled.

**How to correct duplicate enrollments**
Once you're ready to fix your duplicate enrollments, you should do the following:

1. Decide which enrollment you want to keep. You can always change enrollment dates and update information, so if you're comparing enrollments and one has annual assessments, family members, and clients notes, while the other has only enrollment screen information, you should keep the more detailed one (Need to compare enrollment data? Use the **[GNRL-220] Program Details** report.)
2. Update the target enrollment (the one you want to keep) with any missing information from the duplicate enrollment (again, the **[GNRL-220] Program Details** report can help).

3. If you need to move services from the duplicate enrollment to the target enrollment, we recommend asking the Help Desk to do this for you. Just be very clear with which services you want to move from the duplicate enrollment to the target enrollment.
4. Once you've updated any details and have information on any services that may need to be moved to the target enrollment, contact the Help Desk with your request to delete the duplicate enrollment (and move any services, if applicable).

**Contact the Helpdesk at marin@bitfocus.com** and they can work with you to get your enrollments cleaned up.

# Report Spotlight

## [DQXX-110] Duplicate Clients

The **[DQXX-110] Duplicate Clients** is a report using information from the client profile screen. The report is designed to identify potential duplicates in Clarity Human Services client records - ***but it will only find client matches created within the agency(ies) that you have access to***. **Running this report will not identify duplicates system-wide** (unless you happen to have additional agency access to all of the agencies in Marin County HMIS).

This report is found in the Data Quality section of the Report Library. The report identifies client matches using the following data points only:

- Name
- Social Security Number
- Date of Birth

The Duplicate Clients report can help you identify when your clients have duplicate profiles in Clarity Human Services, by providing you with a list of clients ***enrolled in one of your projects*** who may have a duplicate record. We recommend using the “Web Page” Report Output format, which will allow you to click into the client profile(s) directly from the report. However, this report is also available in PDF and Excel formats.

Please run this report and look at the potential duplicates. If you can confirm that they are indeed duplicates, send their Unique ID's to the Helpdesk and let us know which one is the most accurate or current. We refer to this as the "primary" record.

**Duplicated Client List** | **Bitfocus System Agency**

| | Unique ID | Name | SSN | DOB | Added Date | Staff | Agency Name |
|---|---|---|---|---|---|---|---|
| | **B11297945** | **Tester, Loren** | **xxx-xx-0000** | **10/10/1985** | **06/08/2016** | Craig, Loren | Bitfocus System Agency |
| Y | BCF3EC2C0 | Test, Loren | xxx-xx-0000 | 10/10/1985 | 11/30/2016 | Craig, Loren | Bitfocus System Agency |
| | A08FD0F0B | Test, Loren | xxx-xx-0000 | 10/10/1985 | 02/02/2017 | Craig, Loren | Bitfocus System Agency |

**Total records: 3**

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**What is a "primary" record?**
When we merge client records, we keep almost all of the data for both clients. The enrollment, service and referral histories from both records are all moved into one record.

**Choosing a primary record only impacts two things:**

1. The primary record's Unique ID is retained and the other Unique ID is entered into the Alias field.
2. If any of the profile data differs, such as spelling of the name, the information from the primary record is retained.

Duplicate client records can be confusing for staff doing data entry, and they cause inaccurate reports. Please help eliminate duplicate client records by running this report regularly.

## News

# Bitfocus is Hiring!

Bitfocus hiring for multiple positions! Check out our job postings **here**.

Apply today!

## Questions? Your HMIS Administrator is happy to help.

Phone: 415-429-1400
Email: marin@bitfocus.com

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