ALAMEDA COUNTY HMIS USER TRAINING

BITFOCUS & ALAMEDA COUNTY HMIS

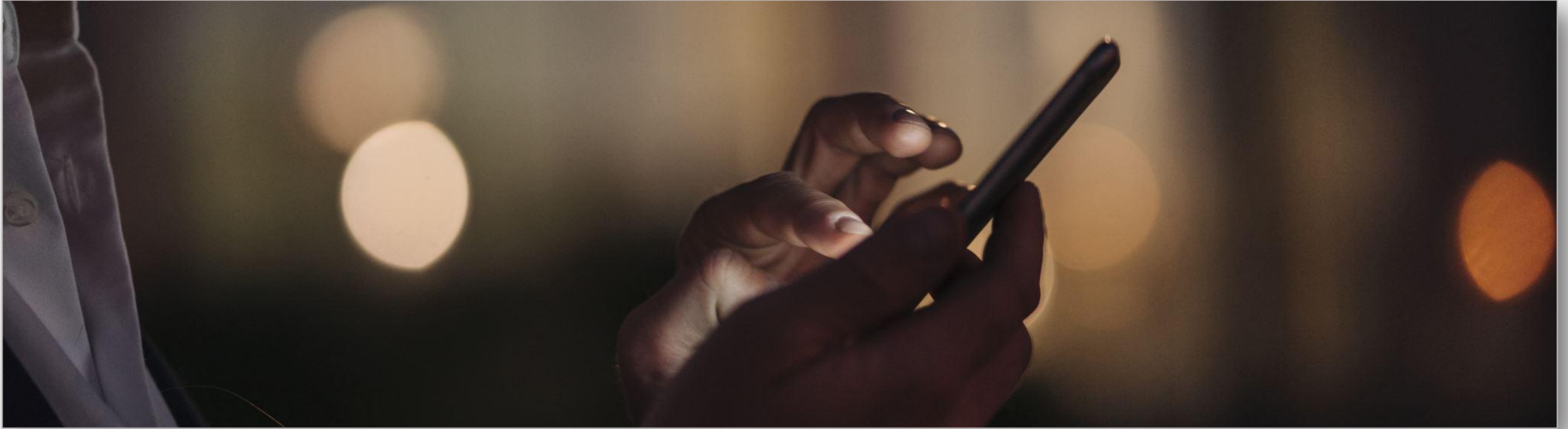**Bitfocus**

TOPICS

Entering Client Contact Information

Location Tab Overview

Managing Households

Duplicate Clients

ENTERING CLIENT CONTACT INFORMATION

Entering Client Contact Information

When should you add client contact information?

Upon initial contact with the client and/or when, there is a change in client contact information (Phone number change, email change, new case manager, etc.)

Make sure to include additional client contacts (Case Manager, Landlord, Primary Care Provider, Emergency Contact, Public Benefits, etc.)

Why it is important to add client contact information?

The information is important for providers to contact their clients.

It is important for providers to have up-to-date information with clients should a resource become available.

CREATING CLIENT CONTACT RECORDS

The client record CONTACT tab is a place to record and share a client's contact information (phone numbers and email address).

Multiple contact can be added within the contact record.

Contact info can be edited and across agencies.

The CONTACT tab can be enabled or disabled in the agency's Navigation Profile and a staff member's Access Role.

**Alameda County CE Agency (Test)

SEARCH FOR A CLIENT

ADD CLIENT ⊕

🔍 Enter search terms for a client

SEARCH

Use full name, partial name, date of birth or any combination.

⚠ **Alameda County Training Site**
- **Do not enter data for real clients**
- **Client data should be made up**

Managed with **Clarity Human Services**

🗑 Recover deleted data

To create a contact record:

- Click the CONTACT tab within the client record and click ADD CONTACT.

Select an appropriate *Contact Type (Emergency Contact, Case Manager, Public Benefits etc.)*

Enter an email address, phone number, or both for the contact information.

Select a *Date* to Associate with the contact, and a not if applicable.

You can turn off the *Active Contact* toggle is the contact is no longer accurate.

Wonder Woman

PROFILE PROGRAMS NOTES FILES HISTORY **CONTACT** LOCATION REFERRALS ASSESSMENTS

CLIENT CONTACTS   ADD CONTACT ⊕

EDIT CONTACT

Contact Type	Emergency Contact ⌄
Name	Walter Jones
Email	WalterJones@gmail.com
Phone (#1)	000-000-0000
Phone (#2)	908-654-8721
Active Contact	🔵
Private	⚪
Contact Date	04/18/2023 📅
Created by Agency	**Alameda County CE Agency (Test)
Created by Staff	Kelsey Main
Created on	04/17/2023
Note	B *I* ≔ ≔
	Friend of Wonder Woman.

SAVE CHANGES   CANCEL

DO NOT TOGGLE THE CLIENT CONTACT INFORMATION TO "PRIVATE"

Unless you are required to do so, avoid using the Privacy Toggle as it limits client contact information from being shared across the system.

EDIT CONTACT

Contact Type	Emergency Contact
Name	Walter Jones
Email	WalterJones@gmail.com
Phone (#1)	000-000-0000
Phone (#2)	908-654-8721
Active Contact	
Private	
Contact Date	04/18/2023
Created by Agency	**Alameda County CE Agency (Test)
Created by Staff	Kelsey Main
Created on	04/17/2023
Note	Friend of Wonder Woman.

SAVE CHANGES **CANCEL**

Contacts Created by staff members will be listed in the CONTACT tab. Depending on access and sharing settings, users may be able to view, edit, or delete records from other agencies.
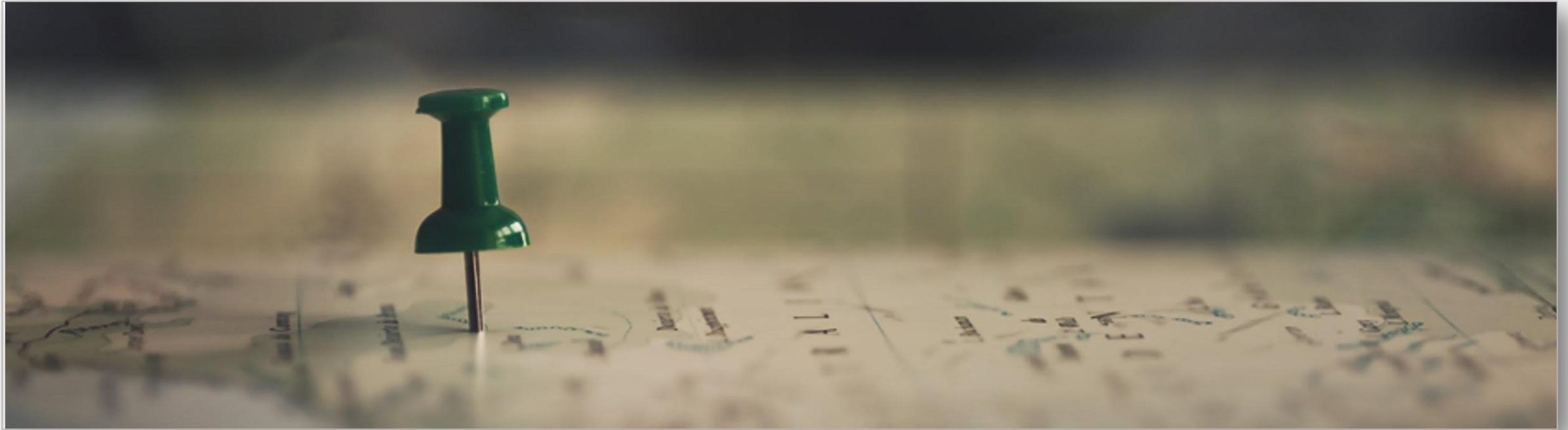

Simply hover over the edit icon from the CONTACT tab and click the edit icon to change client contact information.

QUESTIONS?

LOCATION TAB OVERVIEW

LOCATION TAB OVERVIEW

When should you enter a client's location?

Upon initial contact with client.

If the client has moved or changed locations.

Why should you enter a clients location?

Keeping track of a clients location will ensure that your agency and other providers can find that client should a resource become available.

LOCATION TAB OVERVIEW

The LOCATION tab in the client record allows you to record and view client geographic location information with a *Location Type* of "Field Interaction" or "Address"
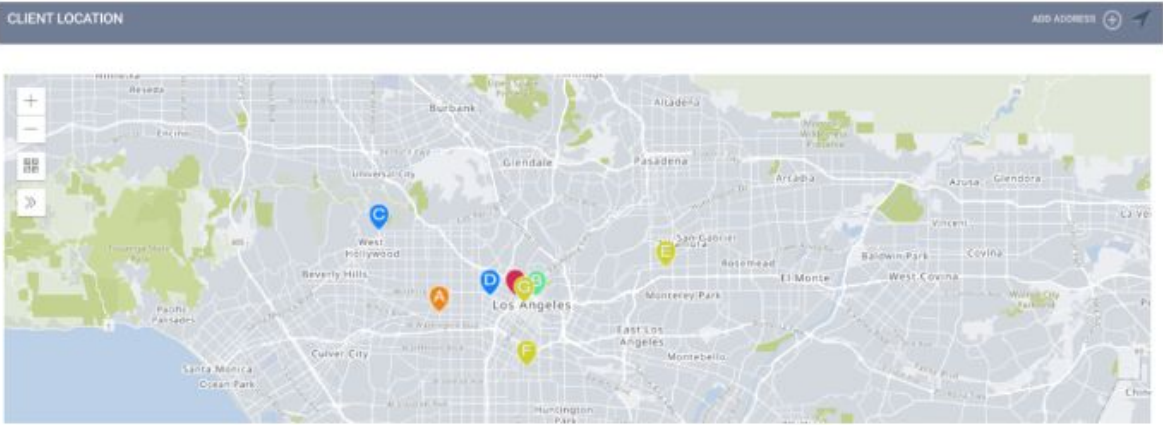

Click here to go into location!

LOCATION TAB OVERVIEW

The system will display previously recorded location information in the location results and on the map.

These results include:
- Staff member name who updated the location record.
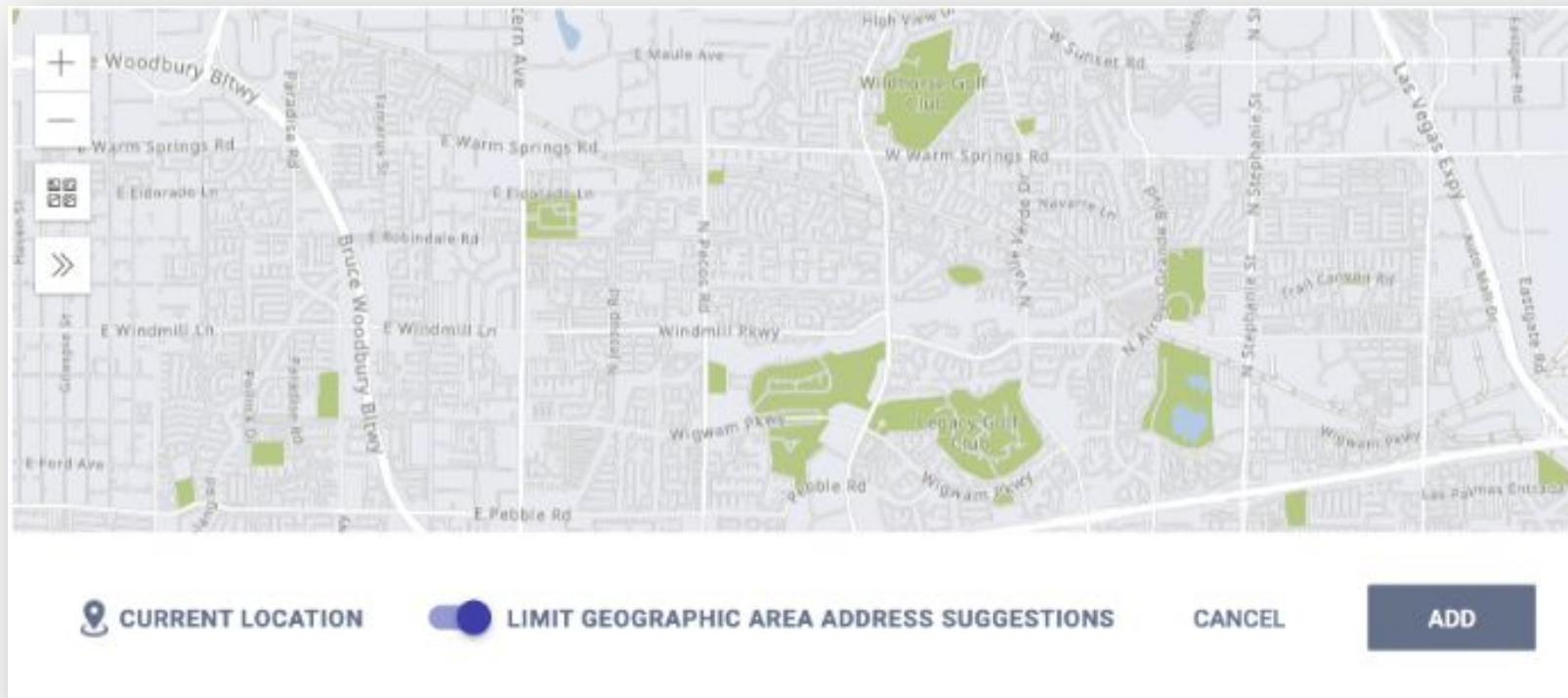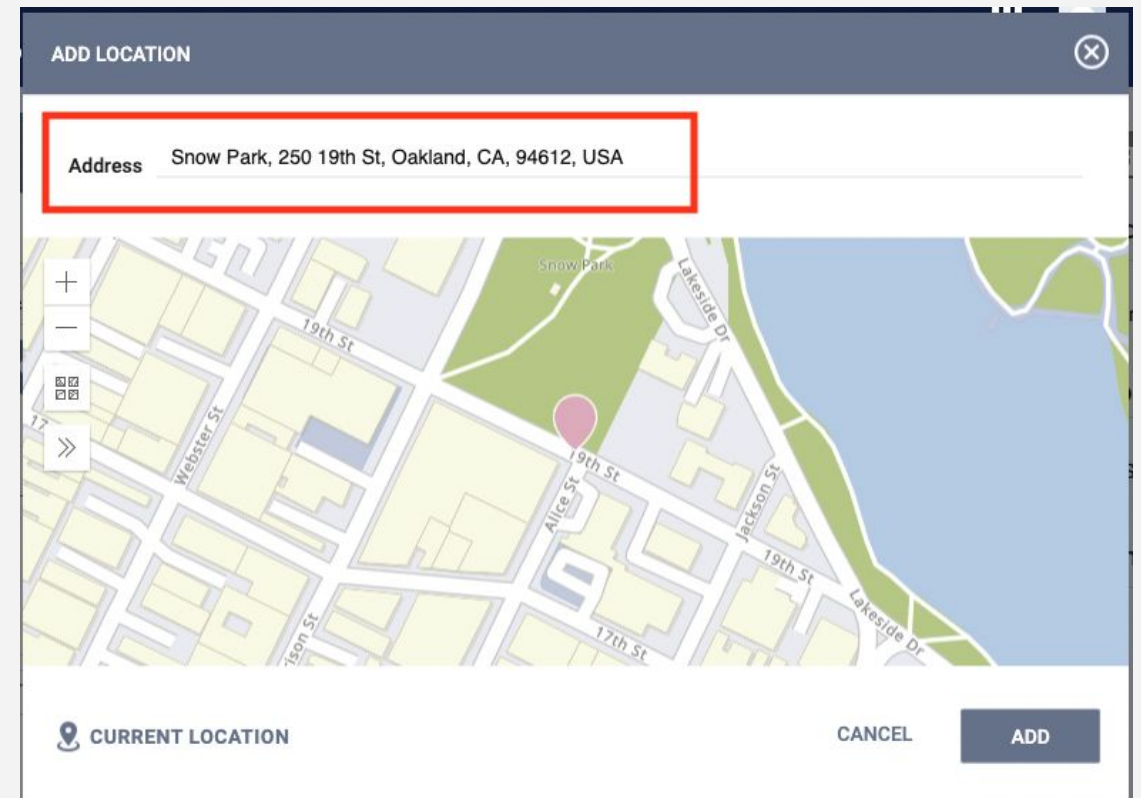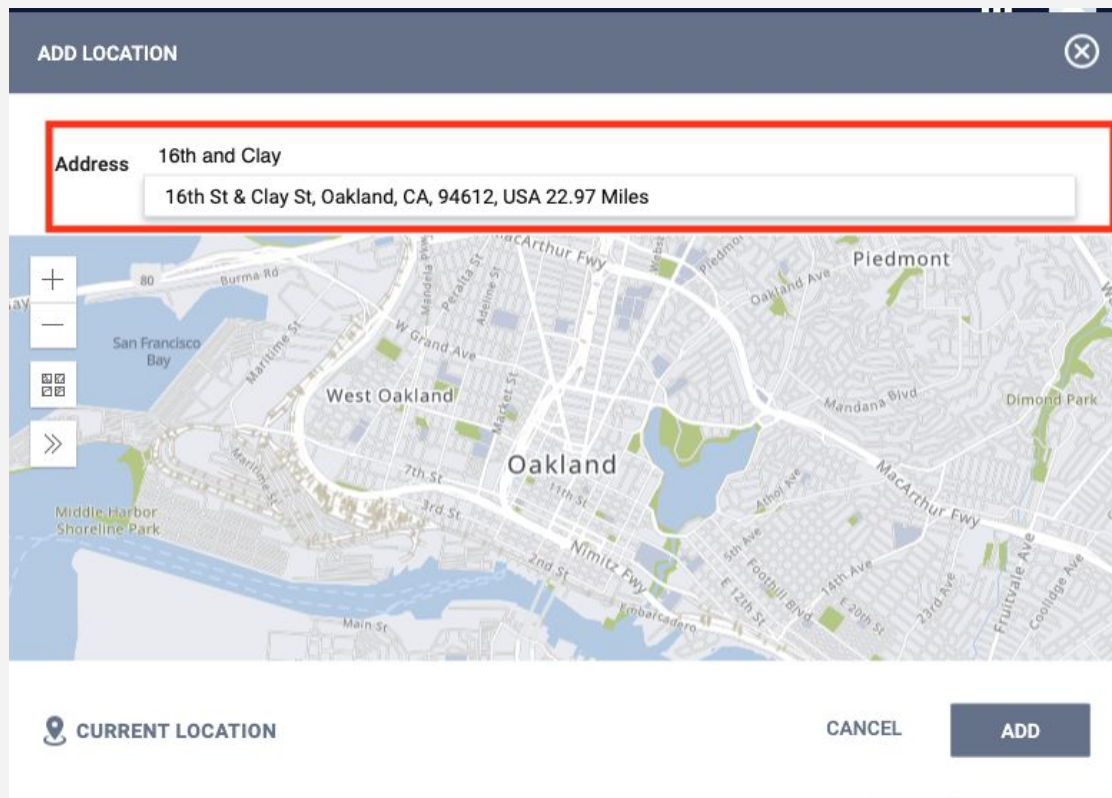- Location Type
- Location Date

GEOLOCATION FEATURE

■ The Geolocation feature lets users add location information to a client's record. This information is displayed on the map within the location tab.

GEOLOCATION FEATURE

■ This feature enables users to mark locations using streets instead of a specific address and also record specific monuments in their area for location reference.

LOCATION TAB OVERVIEW

You can add *Address* and *Field Interaction* location records from the LOCATION tab.

Field Interactions

- Provide a quick way to record location data based on device location.
- To record this type of location, click the **Locate** icon.

Add Address
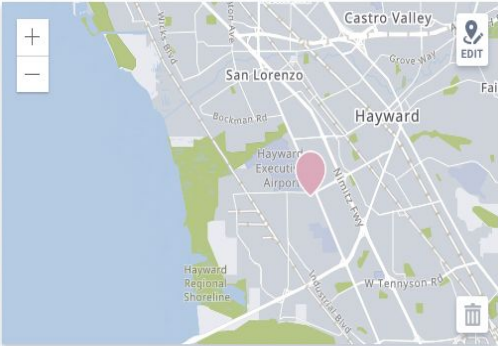
- To add an **Address** location, click *ADD ADDRESS*.
- **Address** locations include additional information fields
  - Address Type
  - Name
  - Location Date
  - Active Location
  - Private

LOCATION TAB OVERVIEW

Address and **Field Interaction** location records can be edited by hovering over the location and clicking the edit icon

QUESTIONS?
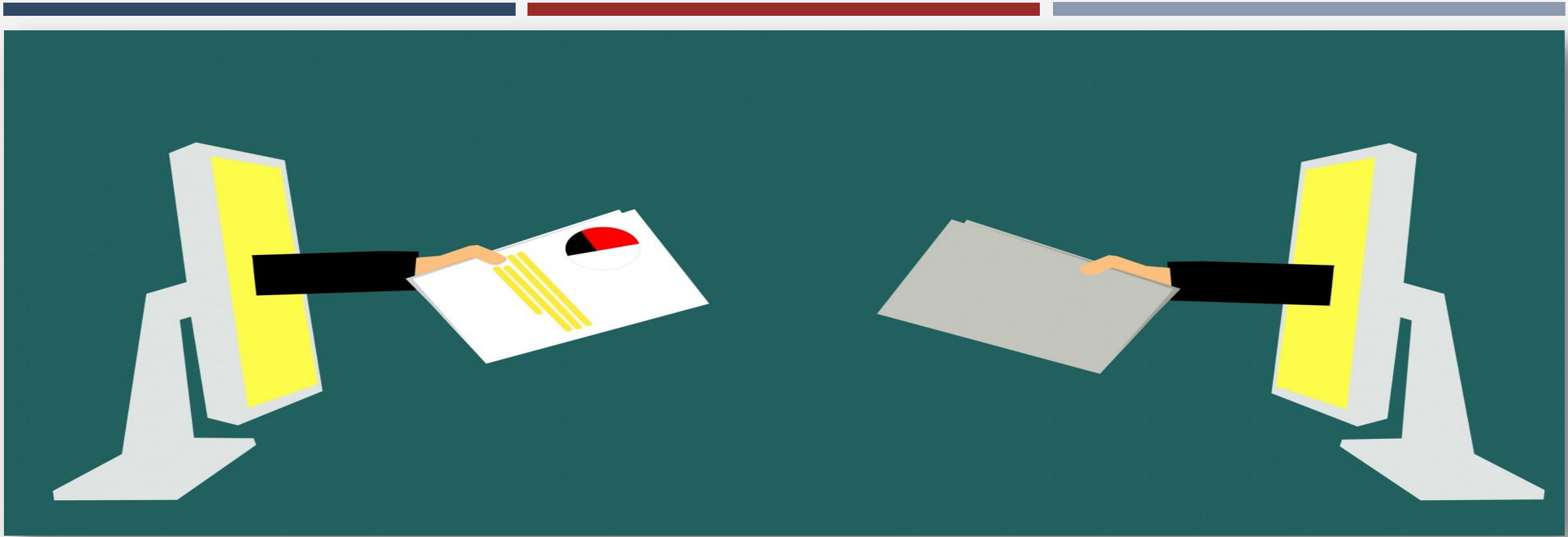
AVOIDING DUPLICATE CLIENTS

Creating New Profiles - Searching for Clients in HMIS

SEARCH FOR A CLIENT   ADD CLIENT ⊕

🔍 Search By Name, Partial Name, DOB, or SSN   SEARCH

Use full name, partial name, date of birth or any combination.

Search Full Name → Search Partial Name → Date of Birth → Social Security Number → Create a New Profile
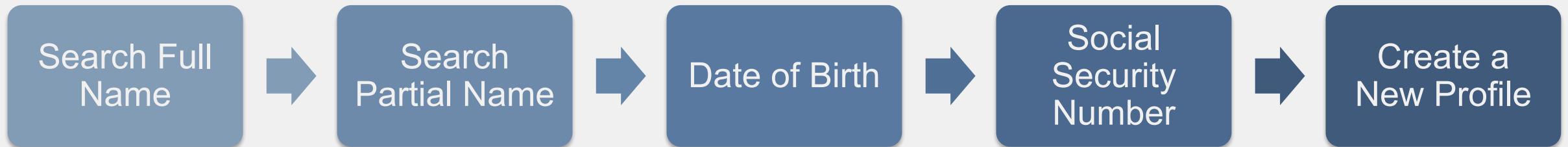
Creating New Profiles

If you have exhausted all search methods, then create a new client profile. Please make sure to collect as much information as possible

🚫 **Avoid using:**
- Client refused
- Client Doesn't Know
- Data Not Collected
- Approximate or Partial

✅ **For existing profiles, confirm that all information is correct.**

CREATE A NEW CLIENT

Social Security Number	__ - __ - ____
Quality of SSN	Select
Last Name	
First Name	
Quality of Name	Select
Quality of DOB	Select
Date of Birth	__/__/____
Middle Name	None
Gender	Select
Race	Select
Ethnicity	Select

Please fill in Release of Information form   CANCEL

Duplicate Clients

Contact your HMIS Administrator to merge Enrollments
Bitfocus Help Desk: hmissupport@achmis.org
Only include the client's Unique Identifier (UID) when emailing about clients.

[DQXX-110] Duplicate Clients Report

- The Duplicate Clients report is a report using information from the client profile screen.
- The report is designed to identify potential duplicates in Clarity Human Services client records.
- This report is found in the Data Quality section of the Report Library.
- This is an administrator report, not everyone will have access to this report.

Duplicated Client List | Admin Version

🔒	Unique ID	Name	SSN	DOB	Added Date	Staff	Agency Name
	6112B0DF3	Unicorn, Happy	xxx-xx-7891	01/11/1980	03/27/2018	Scott, Nate	Nate's Seahawks Training Agency
	BFD3377C5	Unicorn, Happy	xxx-xx-7891	01/11/1980	03/27/2018	Scott, Nate	Kerri's Awesome Training Agency
	3B5DB8796	Unicorn, Happy	xxx-xx-7891	01/11/1980	03/27/2018	Scott, Nate	Nate's Seahawks Training Agency
	4CAAE9BE0	Townsend, Deborah	xxx-xx-2225	07/10/1967	05/14/2018	17, Train	Beez Kneez
	0CC386F0E	Townsend, Deborah	xxx-xx-2225	07/10/1967	05/14/2018	61, Train	Beez Kneez
	CBDE5C7DA	Yount, Trey	xxx-xx-0000	03/15/1976	05/16/2018	07, Train	Beez Kneez
	8D966CEFA	Yount, Trey	xxx-xx-0000	03/15/1976	05/16/2018	09, Train	Beez Kneez
	9AA273729	Thewlen, Laura	xxx-xx-2478	10/07/1981	07/17/2018	27, Train	Beez Kneez
	B7C0C829C	Hewlen, Laura	xxx-xx-2478	10/07/1981	07/18/2018	CHANGE, DO NOT	Beez Kneez
	D23659461	Craig, Sandy	xxx-xx-8642	09/19/1963	08/21/2018	20, Train	CE - Coordinated Entry
	B691BE796	Craig, Sandy	xxx-xx-8642	09/19/1963	08/21/2018	20, Train	Beez Kneez
	9DD791A7A	Cain, Nellie	xxx-xx-4746	11/07/1961	08/21/2018	25, Train	CE - Coordinated Entry
	C8E0DDEFD	Cain, Nellie	xxx-xx-4746	11/07/1961	08/21/2018	25, Train	Beez Kneez
	B07868BAC	Craig, Marilyn	xxx-xx-3885	01/29/2017	08/21/2018	20, Train	CE - Coordinated Entry
	5E13944ED	Craig, Marilyn	xxx-xx-3885	01/29/2017	08/21/2018	20, Train	Beez Kneez
	1D140FC70	Tate, Sheri	xxx-xx-3822	07/01/1965	02/14/2019	41, Train	Beez Kneez
	F7E413770	Tate, Sheri	xxx-xx-3822	07/01/1965	07/09/2019	41, Train	Beez Kneez
	37161579D	Tate, Jacqueline	xxx-xx-1146	02/27/2010	02/14/2019	41, Train	Beez Kneez
	15051B49D	Tate, Jacqueline	xxx-xx-1146	02/27/2010	07/09/2019	41, Train	Beez Kneez
	0D453A1D2	Pierce, Emanuel	xxx-xx-0473	12/03/1982	03/12/2019	10, Train	Beez Kneez
	C551868DC	Pierce, Emanuel	xxx-xx-0473	12/03/1982	03/12/2019	10, Train	Beez Kneez
	AD1A7A687	Overstreet, Rikki	xxx-xx-3312	02/24/1993	11/12/2019	22, Train	Beez Kneez
	EBA660915	Overstreet, Rikkki	xxx-xx-3312	02/24/1993	11/12/2019	15, Train	Beez Kneez
	BFE46FD7C	Zelaya, Shiloh	xxx-xx-2512	06/23/2011	01/14/2020	58, Train	Beez Kneez
	6855B8E0C	Zelaya, Shiloh	xxx-xx-2512	06/23/2011	01/14/2020	58, Train	Beez Kneez
	A04B6053E	Spruce, Bruce	xxx-xx-5987	02/04/1999	04/15/2020	Hoffman, Sara	Bitfocus Coordinated Entry Agency
	BA5BFA925	Spruce, Burce	xxx-xx-5987	02/04/1999	10/02/2020	Hoffman, Sara	Bitfocus Coordinated Entry Agency
	E2461606C	Wilson, Jane	xxx-xx-0000	05/29/1998	09/11/2020	Wilson, Alison	AbS - Abode Services
	6C131F663	Wilson, Jane	xxx-xx-0000	05/29/1998	09/11/2020	Crosby, Patrick	**Alameda County CE Agency (Test)
	938B4143B	Stilts, Skippy	xxx-xx-0000	02/08/1972	09/17/2020	CHANGE, DO NOT	Beez Kneez
	67D2E60CF	Stilts, Skippy	xxx-xx-0000	02/08/1972	10/15/2021	CHANGE, DO NOT	Beez Kneez
	66AD861DE	Wallace, Ississ	xxx-xx-4152	09/25/1986	12/09/2020	CHANGE, DO NOT	Beez Kneez
	9AA113BEF	Wallace, Ississ	xxx-xx-4152	09/25/1986	12/09/2020	CHANGE, DO NOT	Beez Kneez
	59335C832	Woods, Smandy	xxx-xx-8338	05/22/1974	09/08/2022	CHANGE, DO NOT	Beez Kneez
	F68669308	Woods, Smandy	xxx-xx-8338	05/22/1974	09/08/2022	CHANGE, DO NOT	Beez Kneez

Total records: 35

QUESTIONS?

MANAGING HOUSEHOLDS

Managing Households

Household Members   Manage

Dwight Schrute   Father ★

Malia Mouse   Sister

A "Star" next to the Member Type indicates they are the Head of Household (HoH)

- If the family composition changes, you may need to add or remove family members.

- Each Family member needs to have a record created before you can add the family members together.

EDIT GLOBAL HOUSEHOLD   ⊗

Member Type   Father

Head of Household   Dwight Schrute

Joined Household   08/26/2022

Exited Household   ⬤

SAVE

Managing Households after Enrollment

If you need to add a household member after the HoH was already enrolled, select the Programs Tab, and then select the edit icon next to the program you would like to add the household member to.

Once you are in the program enrollment, select the "Add Icon" to the right of your screen.

An additional screen will appear with the household members. Toggle on the household member you would like to add to the enrollment.

*Note: The Household member must be added to the HoH prior to adding them to the enrollment

QUESTIONS?

ADDITIONAL RESOURCES

Clarity Help Center

- https://help.bitfocus.com/

Alameda County Support Email

- hmissupport@acgov.org

ALAMEDA COUNTY AGENCY LIAISON TRAINING

BITFOCUS & ALAMEDA COUNTY HMIS

TOPICS

Running Data Reports
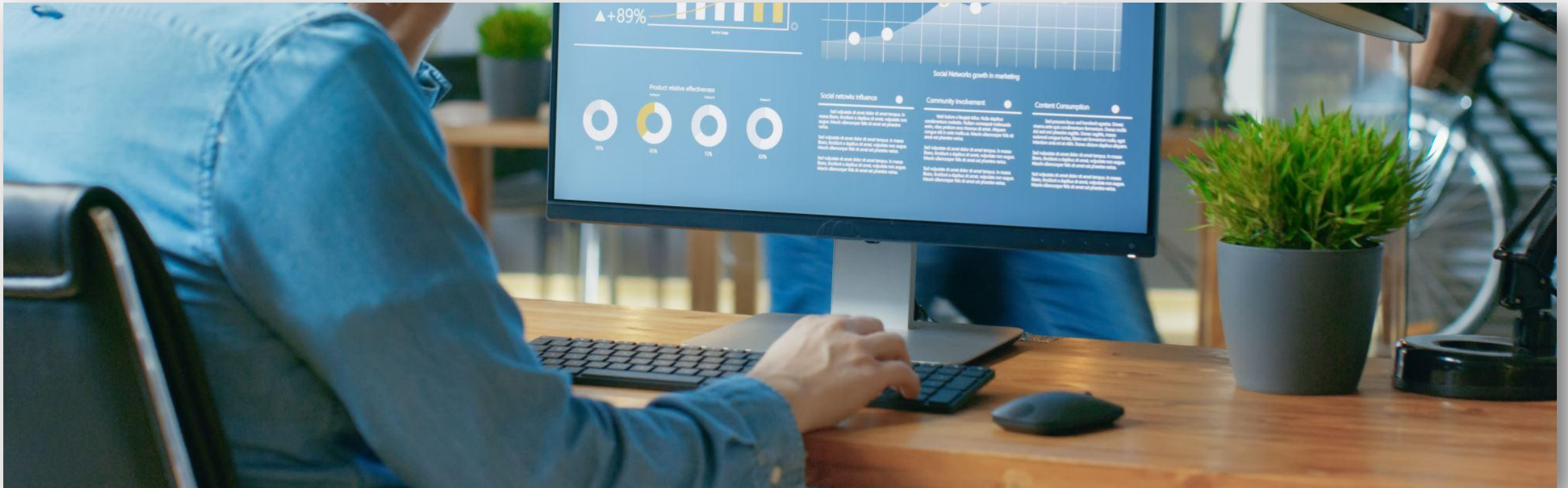
RUNNING REPORTS

RUNNING REPORTS

Step #1:
Navigate to the Launch Pad on your home screen.
Click on the checkered icon.

Step #2:
Click on the paper icon that says *Reports* to navigate to the Report Library.

RUNNING REPORTS

Step #3:
Navigate to the *Report Library* and locate the report you would like to run.

REPORT LIBRARY

Favorite Reports   0 report(s) ⌄

HUD Reports   8 report(s) ⌄

Step #4: Click *Run*

v3.6 [HUDX-224] PATH Annual Report [FY 2022]   ☆ | ⊙ RUN | 📅 SCHEDULE | MORE INFO ⌄

[HUDX-111] HUD CSV / XML Program Data Export [FY 2022]   ☆ | ⊙ RUN | 📅 SCHEDULE | MORE INFO ⌄

[HUDX-225] HMIS Data Quality Report [FY 2023]   ☆ | ⊙ RUN | 📅 SCHEDULE | MORE INFO ⌄

RUNNING REPORTS

Setting Report Parameters:

When you click on "Run," you will be directed to the Preview tab, where you can configure the report parameters.

The available parameter options will vary depending on the report as each report is unique. Once you have selected the appropriate parameters, you can proceed to run the report by clicking the "Submit" button.

RUNNING REPORTS

Pending and Completed Reports:

Once you have clicked the "SUBMIT " button, a pop-up box called "Report Queue Manager" will appear, indicating that your report is being processed.

REPORT QUEUE MANAGER.

Your report has been added to the Queue.

Please check the Queue Manager in the top

right of your screen to review processing status.
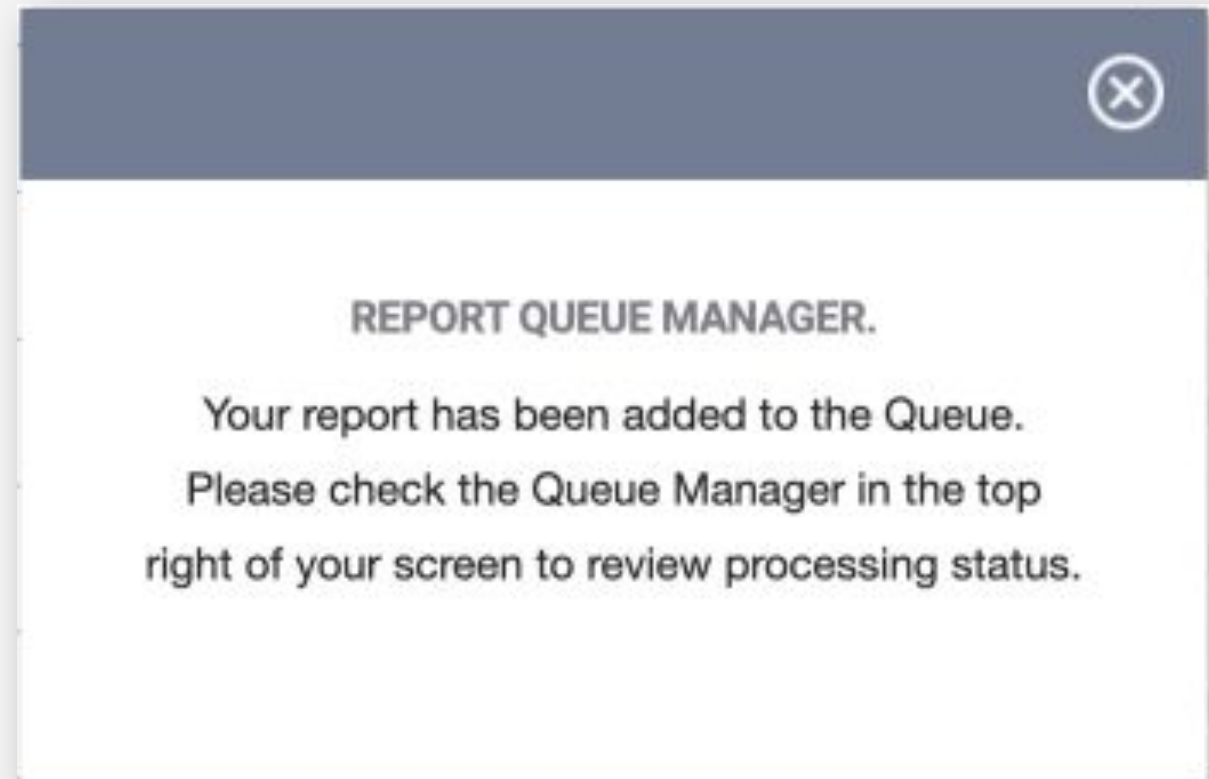
RUNNING REPORTS

If you click the *Report Queue* icon, you can view the status of the report.
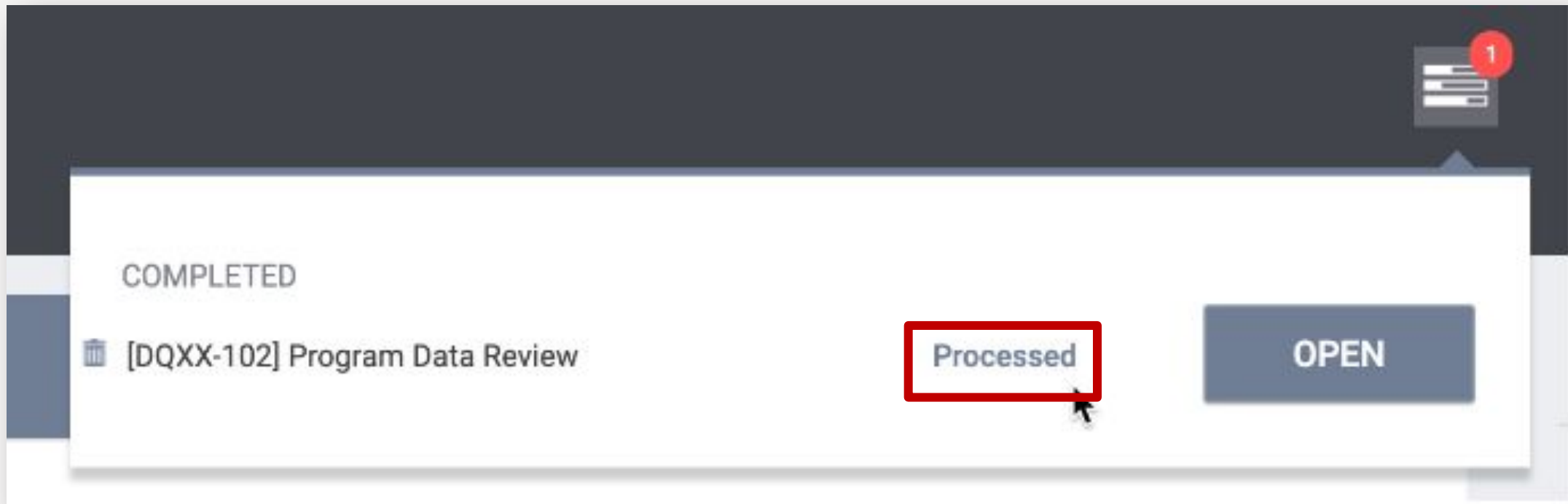
RUNNING REPORTS

Once the report is finished running, another popup appears, notifying you that the report is ready.
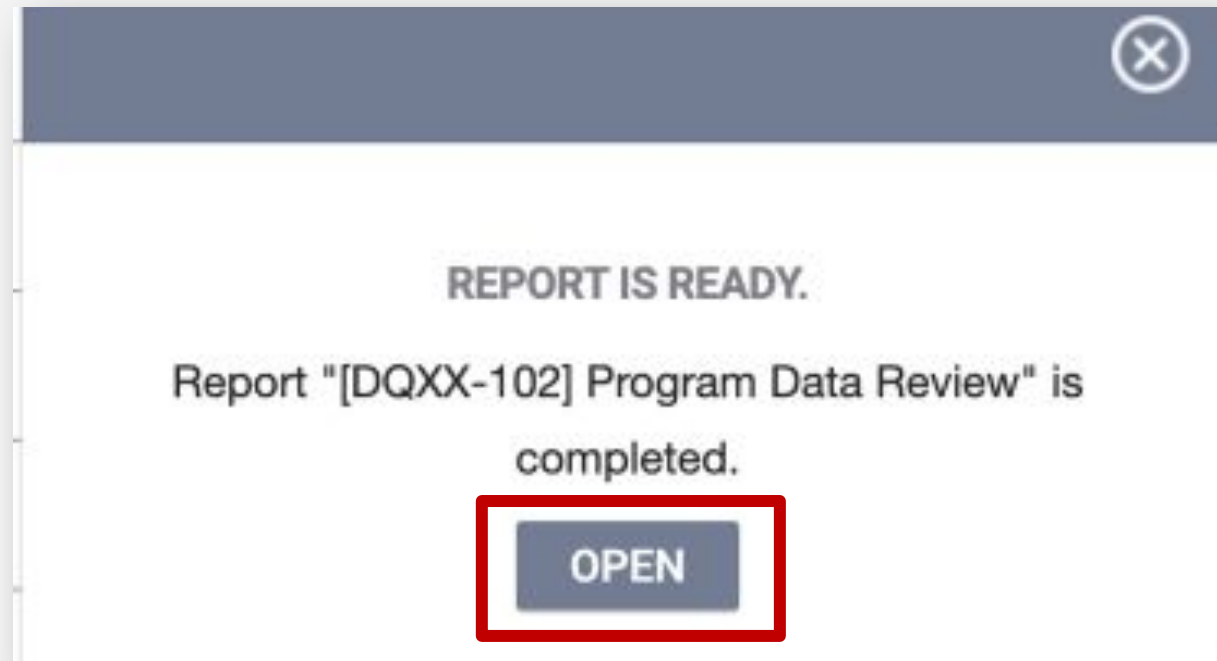
KEY REPORTS

[GNRL-106] Program Roster

[HUDX-225] HMIS Data Quality Report [FY 2020]

[DQXX-102] Program Data Review

[GNRL – 106] PROGRAM ROSTER REPORT

This program-based report lists program stay information for selected programs and status according to specified report dates.

Demo Agency

REPORT LIBRARY   EXPLORE   DATA ANALYSIS

Program Roster Report

Demo Agency
Active within 06/01/2019 thru 06/01/2022

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null,   = Non PH Project,   **A:** Assessments,   **S:** Services,   **CN:** Case Notes
You can find more information about adjusted Move-In Date at the Help Center Article

| Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
Program: Zion Housing												
Mouse, Malia	33347CB86	01/02/2018	1	4	02/01/2019	-	1,217	undefined	0	0	0	S. Jones*
Mouse, Minnie	471CA3370	01/25/1985	33	37	11/11/2018	-	1,299	11/11/2018	0	1	0	S. Jones*
Tree, Pine	61F0D4B00	06/04/2011	9	11	06/25/2020	-	707	undefined	0	0	0	S. Hoffman
Tree - do Not Use, Evergreen	76764A8E7	07/01/1988	32	34	10/26/2020	-	584	10/26/2020	0	0	0	S. Hoffman
West Coast, Ginny	0276CF56B	04/09/2002	18	20	10/30/2020	-	580	11/15/2020	0	0	0	A. Banas*
General, George	16764155B	04/26/1955	65	67	02/19/2021	04/15/2021	55	02/19/2021	0	0	0	S. Hoffman
Doe, Danny	F1D1FDADE	04/29/2000	20	22	02/19/2021	03/19/2021	28	02/19/2021	0	0	0	S. Hoffman

Number of Enrollments: 7
Number of Unique Clients: 7
Number of Households: 6

Total Number of Enrollments: 7
Total Number of Unique Clients: 7
Total Number of Households: 6

[HUDX -225] HMIS DATA QUALITY REPORT [FY 2022]

The [HUDX-225] HMIS Data Quality Report is a HUD report that reviews data quality across several HMIS data elements.

HMIS Data Quality Report [FY 2022]

Demo Agency
CoC Category Filter: Agency CoC
Date Range: 07/01/2021 thru 06/30/2022

Q1. Report Validation Table

Program Applicability: All Projects

Total number of persons served	8
Number of adults (age 18 or over)	5
Number of children (under age 18)	3
Number of persons with unknown age	0
Number of leavers	0
Number of adult leavers	0
Number of adult and head of household leavers	0
Number of stayers	8
Number of adult stayers	5
Number of veterans	1
Number of chronically homeless persons	5
Number of youth under age 25	1
Number of parenting youth under age 25 with children	0
Number of adult heads of household	4
Number of child and unknown-age heads of household	1
Heads of households and adult stayers in the project 365 days or more	4

[DQXX – 102] PROGRAM DATA REVIEW

This is a program enrollment-based report utilizing information from both the enrollment screen and, if applicable, the exit screen.

Program Data Review

Demo Agency
Program: Zion Housing
Program Type: PH - Permanent Supportive Housing (disability required for entry)
Status: Active

Name	Unique Identifier	Entry Date	Exit Date	Days active in program	Missing Entry Data	Missing Exit Data
Mouse, Malia	33347CB86	02/01/2019	-	1,286	5	-
Mouse, Minnie	471CA3370	11/11/2018	-	1,368	0	-
Tree, Pine	61F0D4B00	06/25/2020	-	776	0	-
Tree - do Not Use, Evergreen	76764A8E7	10/26/2020	-	653	0	-
West Coast, Ginny	0276CF56B	10/30/2020	-	649	3	-
Beetlejuice, Jillian	3CD94B5F3	06/14/2022	-	57	0	-
Beetlejuice Jr., Juju	38F35532C	06/14/2022	-	57	0	-
Beetlejuice, Juju	A6DCE7B9F	06/14/2022	-	57	0	-

QUESTIONS?

ADDITIONAL RESOURCES

Clarity Help Center

- https://help.bitfocus.com/

Alameda County Support Email

- hmissupport@acgov.org