ALAMEDA COUNTY HMIS USER GROUP MEETING
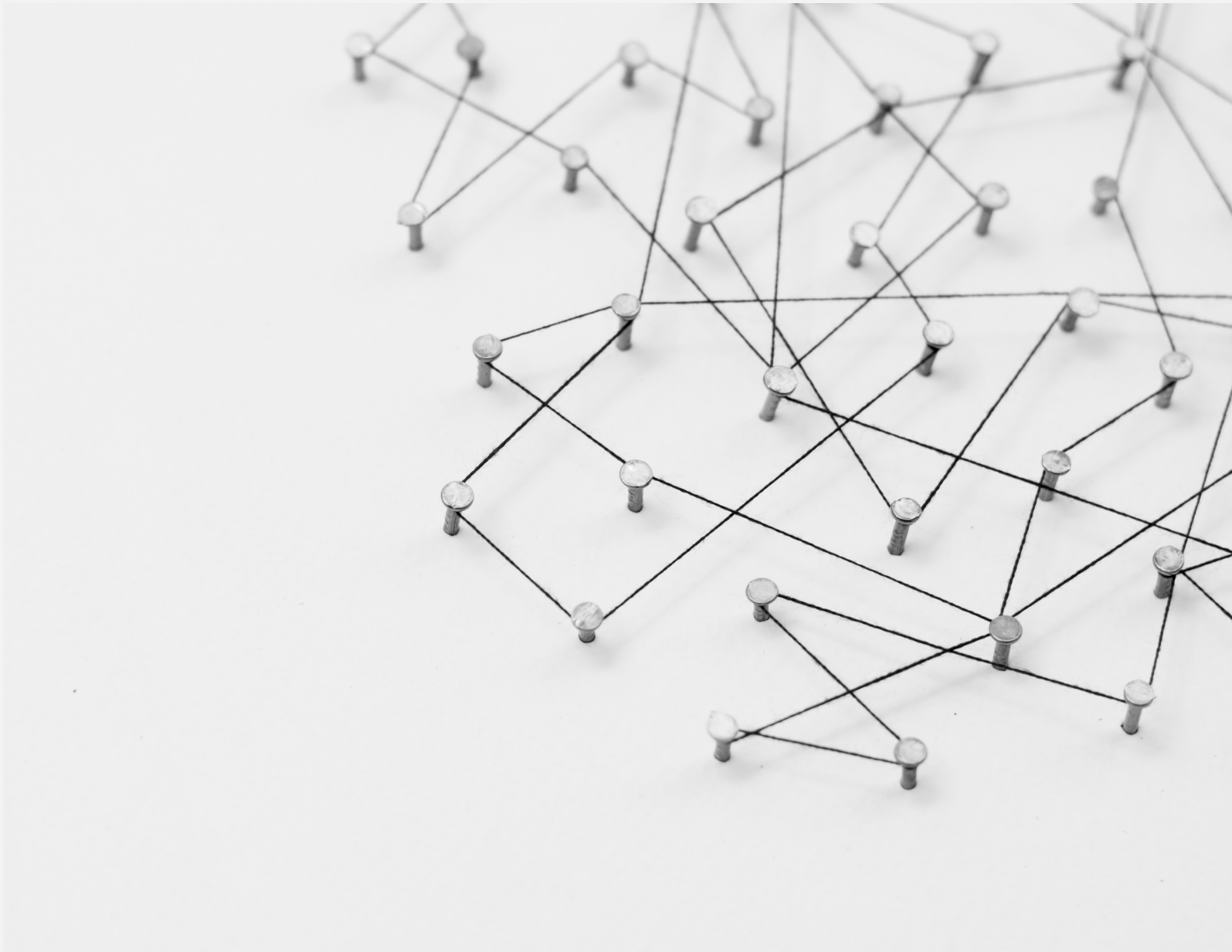
JUNE 2023

Bitfocus

AGENDA

Recording Accurate Household Enrollments

Care Team Members

Recording Accurate Household Enrollments

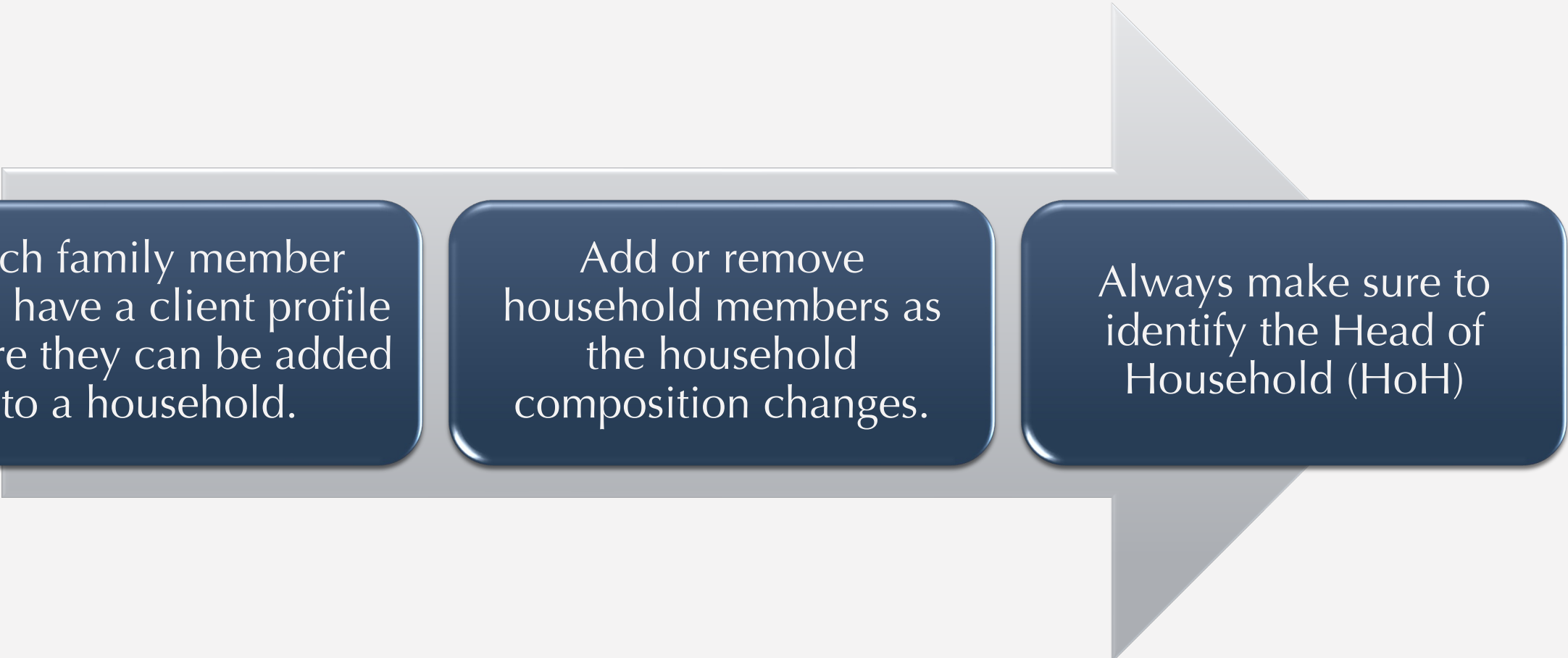# TIPS TO MANAGING HOUSEHOLDS!

- By default, a newly created client record will not be associated with a household.

- Active household members will be listed in the "Household Members" section in the right-hand sidebar of a client's profile.

- Use the Manage button on the client's profile page to add/join members to a household.

- Clients can leave or join a new household, but can not be a member of two households at the same time.

- Household members can be exited from a household by toggling a single button and recording the date they exited the household.

- The exited date can not be earlier than the joined date.

- If the exited household member is the head of household, there will be a prompt to select a new head of household.

- A member who is exited from a household can rejoin the household at any time.

RECORDING ACCURATE HOUSEHOLD ENROLLMENTS

Each family member must have a client profile before they can be added to a household.

Add or remove household members as the household composition changes.

Always make sure to identify the Head of Household (HoH)

MANAGING HOUSEHOLDS

Household Members

Manage

Bitfocus Baby   Daughter

Select the "Manage" button to manage Household Members.

Household Members

Bitfocus Test   Mother ⭐

Select the edit icon under Household Members

Bitfocus Ba

EDIT GLOBAL HOUSEHOLD ⊗

Identify the Head of Household

Update information or toggle on exit

Member Type	Daughter ⌄
Head of Household	Bitfocus Test ⌄
Joined Household	03/23/2023 📅
Exited Household	⚪

SAVE

MANAGING HOUSEHOLDS

Household Members

Bitfocus Test   Mother ★

Bitfocus Baby   Daughter

The "Star" indicates who has been identified as the Head of Household (HoH)

MANAGING HOUSEHOLDS

- Toggle on "Exited Household to remove a member from the Household.

- Enter the Date the household member left the household.

- Select "Save."

EDIT GLOBAL HOUSEHOLD

Member Type	Daughter ⌄
Head of Household	Bitfocus Test ⌄
Joined Household	03/23/2023 📅
Exited Household	🔵
	05/01/2023 📅

SAVE

POSSIBLE SCENARIOS

CARE TEAM
MEMBERS

What is a care team member?

An Assigned Staff involved with the client's care:

- Through a Program Enrollment
- Being Assigned Case Manager
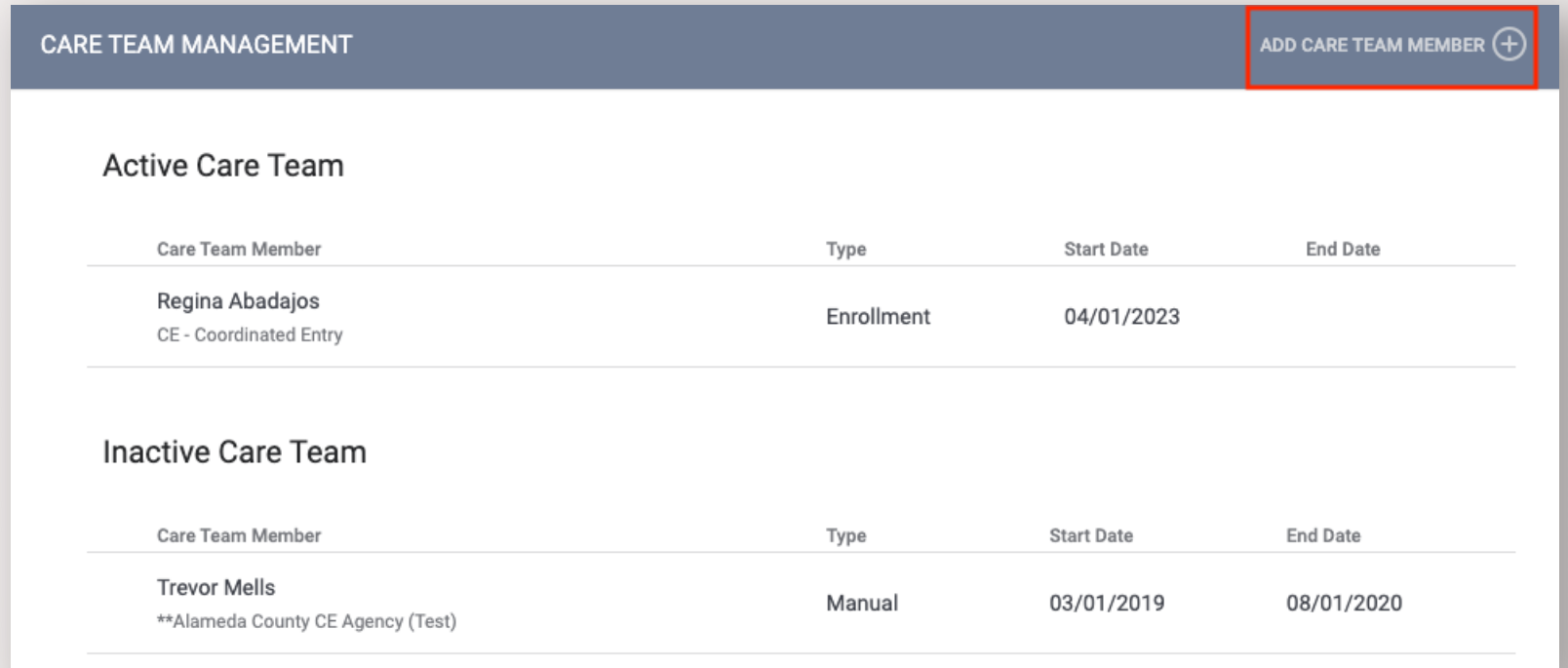- Assigned as a Navigator

1. From the client Profile Page, you can access the Care Team on the right-hand side of the screen.

2. From there, you can manage Care Team Members by selecting the "Manage" button next to the Care Team section.

From the Care Team Management Screen, you will be able to view active and inactive Care Team Members, as well as add new Care Team Members to the Client's profile.

To add a new Care Team Member, select the "Add Care Team Member" button.

CARE TEAM MANAGEMENT   ADD CARE TEAM MEMBER ⊕

Active Care Team

Care Team Member	Type	Start Date	End Date
Regina Abadajos CE - Coordinated Entry	Enrollment	04/01/2023	

Inactive Care Team

Care Team Member	Type	Start Date	End Date
Trevor Mells **Alameda County CE Agency (Test)	Manual	03/01/2019	08/01/2020

ADD CARE TEAM MEMBER ⊗

User   Kelsey Main   ⌄

Start Date   06/01/2023   📅

End Date   __/__/____   📅

Public   ⬤

[ADD]   [CANCEL]

Next, a Pop-Up Screen will allow you to begin to assign a new Care Team Member.

- Select the drop down arrow to select from a list of staff.

- Enter the date the Care Team Member was assigned to the client.

- Select "ADD"

*Avoid using marking the Care Team Member as private (unless you are required to do so) as it prohibits information from being shared across the system.

User

To Remove a Care Team Member, Select the active Care Team Member. Next, enter the date the Care Team Member stopped working with the client and select "Update."

Public

Kelsey Main ⌄

06/01/2023

06/15/2023

UPDATE   CANCEL

76 DAYS ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	04/01/2023
Assigned Staff:	Regina Abadajos ✎
Head of Household:	Charlee Test

CHANGE ASSIGNED STAFF

Make Program Private ⬤

Regina Abadajos ⌄

SAVE CHANGES | CA...

CHANGE ASSIGNED STAFF

Make Program Private ⬤

Regina Abadajos ⌄

☐ Kim Angeles

☑ Regina Abadajos

You are also able to changed the Assigned Staff from the Program Enrollment and selecting Edit Icon and selecting staff from the drop-down list.

You can select multiple staff members by clicking the checkbox next to each name. You can also remove the staff member automatically assigned during enrollment.

Helpful Hints!

By Hovering over the Care Team Member Icon, you are able to view the Care Team Member contact information. ——→
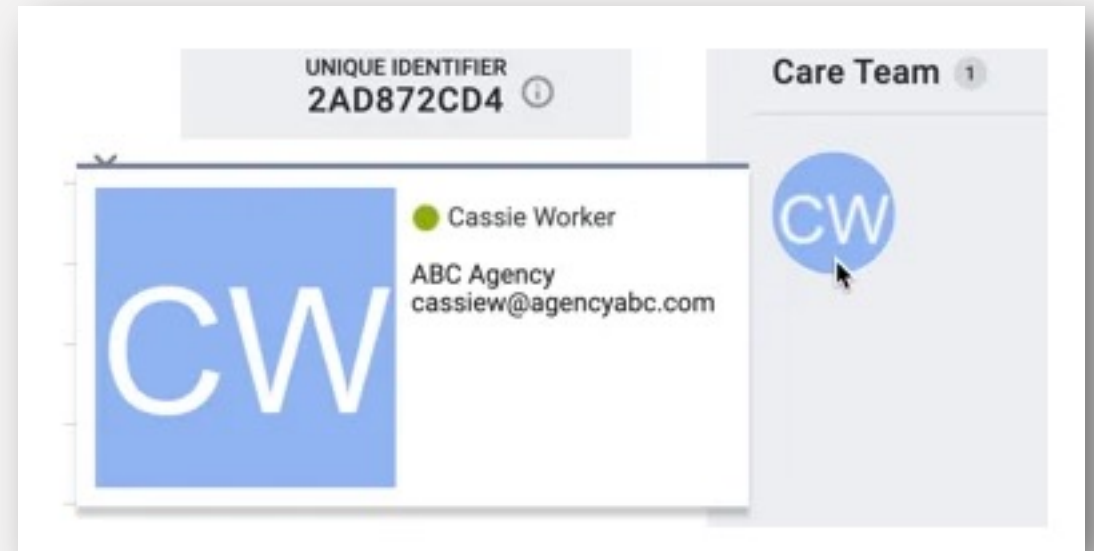
On the Care Team Management screen, you are able to view the whether the assigned staff were added to the Care Team manually or through an Enrollment.

Questions?

ALAMEDA COUNTY HMIS LIAISON MEETING

MAY 2023

Bitfocus

AGENDA

[DQXX-103] Monthly Staff Report

[DQXX-103] MONTHLY STAFF REPORT

[DQXX-103] Monthly Staff Report

(Data Quality Reports)

- General Data Quality
- User Activity
- Data Quality by Data Element for Clients Served

The report also includes staff from other agencies with "additional access" to the reporting agency data. Staff are pulled into this report based on the client's open program enrollments and assigned staff.

All users have access to the Monthly Staff Report in the Report Library.

REPORT LIBRARY

Data Quality Reports > [DQXX-103] Monthly Staff Report

Report Date Range   __/__/____ 📅25 – __/__/____ 📅25

Report Output Format   ● Web Page   ○ PDF   ○ Excel

SUBMIT

Monthly Staff Report | Agency Name

This report is an automated monthly review of your staff participation in Clarity.

Please note, this is a courtesy email report. All data held within is viewable at any time by accessing the Reports Library within Clarity.

Your Agency Average Data Entry Timeliness (in days)	3
Your Refused DQ Score	0%
Your Don't Know DQ Score	0%
Your Not Collected DQ Score	7.0%
Your Unique Client Count	170

This report shows data quality for clients that are included in the report.

User activity is broken into 4 sections:

- Active Staff
- Active Staff – No Activity
- Inactive Staff with Actively Enrolled Clients
- Locked User with Activity

The information in the data table includes (within the report range):

- Unique Clients – Unique number of clients currently receiving service
- New Clients - Unique number of clients new enrolled in a service or program.
- Average Timeliness (in days): Average number of days from the program/service start date to the time the service/program was recorded in Clarity.

Average Percentage of Responses for data elements:

- DQ Don't Know
- DQ Refused
- DQ Not Collected

Active Staff

Name	Unique Clients	New Clients	AVG Timeliness (in days)	DQ % Don't Know	DQ % Refused	DQ % Not Collected
	26	2	4	0%	0%	7.7%
	19	2	5	0%	0%	6.2%
	1	0	0	0%	0%	0%
	39	0	0	0%	0%	9.4%
	29	2	2	0%	0%	7.4%
	14	3	0	0%	0.4%	5.8%
	22	3	1	0%	0%	6.1%

Active Staff - No Activity

Name	Last Login	Days Inactive
	01/04/2021	55
	03/01/2021	0
	03/09/2021	0
	03/08/2021	0
	03/08/2021	0
	03/03/2021	0
	03/09/2021	0

Inactive Staff with Actively Enrolled Clients

Name	Unique Clients	New Clients	AVG Timeliness (in days)	DQ % Don't Know	DQ % Refused	DQ % Not Collected
	4	0	0	0%	0%	0%

Overall data quality is shown by data element.

If your project type is not required to collect all of the elements listed below, clients will be counted as "Data Not Collected".

We recommend running the report regularly to course-correct any data elements that may be missing in order to capture the most accurate and up-to-date client information.

Data Element	Total Don't Know	% Don't Know	Total Refused	% Refused	Total Not Collected	% Not Collected
Profile Statistics						
SSN (3.02.2)	1	2.9%	0	0.0%	0	0.0%
DOB (3.03.2)	0	0.0%	0	0.0%	0	0.0%
Race (3.04)	0	0.0%	1	2.9%	1	2.9%
Ethnicity (3.05)	0	0.0%	0	0.0%	2	5.9%
Gender (3.06)	0	0.0%	0	0.0%	0	0.0%
Veteran Status (3.07)	0	0.0%	0	0.0%	0	0.0%
Program Entry Statistics						
Client Location (3.16.2)					7	13.2%
Household Member Type (3.15)					3	5.7%
Prior Living Situation (3.917)	0	0.0%	0	0.0%	1	1.9%
Times on Streets, ES, SH	1	1.9%	0	0.0%	3	5.7%
Disabling Condition (3.08)	0	0.0%	0	0.0%	3	5.7%
Physical Disability (4.05.2)	0	0.0%	0	0.0%	7	13.2%
Development Disability (4.06.2)	0	0.0%	0	0.0%	8	15.1%
Chronic Health Condition (4.07.2)	0	0.0%	0	0.0%	7	13.2%
HIV / AIDS (4.08.2)	1	1.9%	0	0.0%	13	24.5%
Mental Health Disorder (4.09.2)	0	0.0%	0	0.0%	8	15.1%
Substance Use Disorder (4.10.2)	0	0.0%	0	0.0%	8	15.1%
Domestic Violence (4.11.2)	0	0.0%	1	1.9%	12	22.6%
Income and Sources (4.02.2)	0	0.0%	0	0.0%	7	13.2%
Non-Cash Benefits (4.03.2)	0	0.0%	0	0.0%	7	13.2%
Health Insurance (4.04.2)	0	0.0%	0	0.0%	7	13.2%
Program Exit Statistics						
Exit Destination (3.12)	0	0.0%	0	0.0%	2	25.0%
Income and Sources (4.02.2)	0	0.0%	0	0.0%	2	25.0%

DATA CHECK!

- ✓ Check Data Regularly! Reports should be reviewed as often as possible.

- ✓ Reports can help you view your program data and performance in a glance.

- ✓ Follow up with Staff who have entered data and amend any discrepancies where possible.

- ✓ Encourage your programs to review their own data on a regular basis. Reports can be pulled by users who have access to the Report Library.

Questions?