Mar 2018 Agency Admin Meeting

Mar 2018 Agency Admin Meeting

Date: Thursday, March 1, 2018
Time: 1:30 – 3:30PM
Place: Sobrato Conference Center, Milpitas
600 Valley Way, Room 1
Milpitas, CA 95035

Slides from the meeting can be found here:

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Please us this link to download slide deck if desired.

Agenda

1. CoC / Coordinated Assessment / UPLIFT Updates
2. Client Privacy Recertification
3. Coordinated Assessment HMIS Reminders
4. HMIS User Survey Results
5. SCC Trainings
6. APR and Sage
7. ROI Reminders
8. Housing Inventory Count (HIC) / Point In Time (PIT) Count
9. Continuous Data Quality Improvement (CDQI)
10. Q&A
11. Time available for HIC/PIT review

Next Agency Admin Meeting:

Thurs, April 5 from 2:30-3:30pm

The Performance Management Work Group will meet from 1:30-2:30pm before the Agency Admin Meeting

Location: Sobrato Conference Center, Milpitas
600 Valley Way, Room 1
Milpitas, CA 95035

Dates and locations for 2018 meetings are listed on the OSH website:
https://www.sccgov.org/sites/osh/continuumofcare/osh-events/pages/home.aspx

CoC / Coordinated Assessment / UPLIFT Updates

CoC/Coordinated Assessment:

1. Coordinated Assessment Workgroup Meeting – Thursday, March 8th, 1-2:30 at The Health Trust board room – will be discussing some new DV policies and the annual Coordinated Assessment System evaluation.
2. CoC Training: Housing First-Centered Case Management – Monday, March 19th, 9:30am -12:30pm at Berger Auditorium (1555 Berger Drive)
3. CoC Membership Meeting – Monday, March 19th, 1-2:30pm at Berger Auditorium (1555 Berger Drive) – Program updates, policy updates, governance charter changes

"What we learn with pleasure we never forget."

Alfred Mercier

Announcements >>

Click Here to Access the Santa Clara County CoC Continuous Data Quality Improvement Process

Click Here to Access the SCC Clarity Feature Enhancement Request List

FEATURED | BLOG | NEWS

February 2021 Agency Admin Meeting
January 2021 Agency Admin Meeting
December 2020 Agency Admin Meeting

May 2021

M	T	W	T	F	S	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

« Feb

UPLIFT:

1. We have 96 Jan-Mar'18 UPLIFT stickers left. These stickers are available to every UPLIFT agency First Come, First Served.
2. Apr-Jun'18 allocation information will be emailed on 3/9/2018 to everyone on UPLIFT email distribution list.
3. 1st day to send Apr-Jun'18 UPLIFT referral: 3/16/2018. Any Apr-Jun'18 referral before 3/16/2018 will not be picked up by UPLIFT report

Client Privacy Recertification

- Every year, HMIS users are required to retake the Client Consent training and recertify
- The new Client Consent training is still in process. When it is available it will be added to http://scc.hmis.cc/training/schedule-a-training/
- Recertification will take place for all HMIS users:
  - Users will be asked to watch the Client Consent training
  - On a specific date, HMIS users will be required to fill out a recertification form the next time they log in to HMIS, to verify that the watched the consent training
  - An email will be sent to all users with instructions
- End User Agreement Updates
  - Along with the recertification process, a new version of the End User Agreement will be released, pending final approval.
  - Main changes include:
    - Added language describing an End User's responsibilities for coordinated entry and the VI-SPDAT
    - Replaced Initial boxes with bullet points
    - Removed Technical Administrator signature – **Technical Administrators are still required to submit new login requests**

Coordinated Assessment HMIS Reminders

  - Make sure the client has a valid ROI before entering the VI-SPDAT into HMIS
  - Check HMIS to see if the client has had a VI-SPDAT in the past year
  - After completing the VI-SPDAT, don't forget to click the "Refer Directly to Community Queue" button if the score is 4 or higher
  - **Important:** do not refer to any specific programs that may appear on the screen, unless you've specifically been trained to do so (only EAN Homeless Prevention programs using Prevention VI-SPDATs at the moment)
- Add the client's contact information to the Location tab

HMIS User Survey Results

- We received 116 responses to the survey (compared to 73 responses in 2016) – thanks for your participation!
- Survey Results (see slides for more information):
  - Majority of survey participants are in direct services
  - Ways Clarity is used:
    - Highest categories were those that entered data for clients they work closely with and VI-SPDATs
    - Increase in number of users who "Enter data into Clarity for one or more programs at my agency, regardless of how closely I work with the clients served" compared to last year
  - Many users report their agency uses other client data management systems
    - Main reason: Need to capture more data than available in Clarity
  - Data quality:
    - On average, users were more confident in their own agency's data compared to data entered by other agencies
    - Confidence in data quality in for both own agency and other agencies increased slightly compared to last year
  - Data entry:
    - Participants ranked importance of data quality highly (4.80) and as a high priority

for their agency (4.69)
    - Improvement in “How well does the data entry match your intake form?”
    - Increase in importance of capturing non-HUD required information (4.10 vs 3.93)
  - Reports:
    - High scores for ease of use to prepare/submit reports
    - However, comments from some users show room for improvement (Feedback that some users haven’t used reports or can’t find information they are looking for)
  - Satisfaction with Bitfocus services and Clarity software:
    - Improvement in all categories
    - Biggest increases in Help Desk and training, but still room to improve on training
- Takeaways
  - Reporting: More training needed on what reports are available and how to find them, reporting on households is challenging
  - Data entry: Reporting/tracking non-HUD-required items are important for some agencies, many users use multiple data systems so streamlined data entry is important
  - Trainings: Make sure to follow up on questions, potential for improvement
    - Feedback:
      - More training on how to pull demographic information from Clarity
      - Confusion around the top set of tabs and the bottom set of tabs
  - Adjust survey questions to include a place to add contact information if the user wants follow-up
    - Couldn’t follow up with certain items or concerns because anonymous survey
    - Let Bitfocus know if there was something you included in the anonymous survey that you want addressed.
- Feedback
  - What questions should we have asked in the survey? Is there anything you wish we’d asked?
  - What trainings would be helpful for users at your agency?
    - More training on how to pull demographic information from Clarity
    - Confusion around the top set of tabs and the bottom set of tabs
    - Gap between general training and agency specific training. Internal HMIS training to fill in gaps.
    - Convincing staff to use their cell phone to enter data. Training on using cell phones/ipad to enter data
    - Lag time between general training and using Clarity, requires a lot of staff refreshing
    - Children added to the household, but not to the group happens all the time.
    - Program history to verify enrollment
    - Data Quality video
    - Services video (rental assistance, deposits)- from the case manager’s perspectives
    - Troubleshooting related to ROI training
    - Transcript of all the services they received at shelter (Client Reports-printer icon) client summary report
  - If you or any of your users would like specific follow-up on your survey comments or have additional comments, please let anyone at Bitfocus or OSH know

SCC Trainings

  - General SCC HMIS site: http://scc.hmis.cc/
      - Required Trainings for User Accounts: http://scc.hmis.cc/training/schedule-a-training/
      - Looker Trainings for Agency Managers: http://scc.hmis.cc/training/schedule-a-training/
      - UPLIFT: http://scc.hmis.cc/training/uplift/
      - Coordinated Entry Toolkit: http://scc.hmis.cc/training/coordinated-entry-toolkit/
    - Client Forms: http://scc.hmis.cc/client-forms/
  - Clarity Help Portal: https://get.clarityhs.help/hc/en-us
      - End User Help: https://get.clarityhs.help/hc/en-

us/categories/115000086148-Getting-Started
    - Report Library: https://get.clarityhs.help/hc/en-us/categories/115000093908-Report-Library

- Help Desk
        - Email: sccsupport@bitfocus.com
    - Phone: (408) 596-5866, Ext. 2

- Feedback
    - Remembering to submit certification that you watched the video – make this more obvious on the website

- Make sure users are aware that the Looker training is for Agency Managers and not required for HMIS access

APR and Sage

If you need to submit an APR in Sage:

- Before submitting the report, use the [HUDX-225] HMIS Data Quality Report to review data quality issues

- Run the [HUDX-227] Annual Performance Report [Oct 2017] in Excel format

- Go to the APR/ESG CAPER – CSV Extract tool (http://reporting.hmis.cc/) to convert to CSV format
    - Processing Report = "APR (Oct 2017)"
    - Process Method = choose Email or Download
- Upload file and click "Process"

Detailed instructions (including details for the ESG CAPER) can be found on our Help Portal: https://get.clarityhs.help/hc/en-us/articles/115013115968-Sage-Upload-ESG-CAPER-and-APR

ROI Reminders

- Check to see if a client has a valid ROI before entering data

- If an ROI is already uploaded, review it to make sure you are aware of what is ok/not ok to enter

- When uploading an ROI, make sure the ROI form is fully completed, signed, and dated

- Upload an ROI for every client entered into HMIS (including children)

- If the client does not give consent, enter them as an anonymous client

- If a client's ROI is about to expire, upload a new ROI

- Use the correct ROI form: http://scc.hmis.cc/client-forms/

- Do NOT alter the ROI form in any way

- Do NOT enter client data if the client did not give consent (example: profile photo, disability information)

- Feedback:
        - ROI is sometimes a blank page
    - Make sure all the ROI pages are uploaded

- Creating Anonymous Clients:
    - Social Security Number (SSN)
        - Entered as all 0's (zeros)
        - For Quality of SSN select: Client Doesn't Know
    - Name
        - Unique identifier code is written as last name
        - Be sure to write the unique ID on the paper file so you can link the identity of the client to the anonymous record in Clarity
        - Note that the Clarity-generated identifier will not be created until the record is added to the system.

Ooooo (letter o not zero) is entered for first name
- For Quality of Name select: "Partial, street name, or code name reported"
- Date of Birth (DOB)
  - Enter 01/01/xxxx.
  - For example, if a client was born on 7/3/1980 enter 1/1/1980 into Clarity
  - For Quality of DOB select: Approximate or partial DOB reported
- Location Tab
  - Leave blank
- Question: Can an agency use their own internal identifier number (from their own agency database) for the last name instead of the Clarity Unique Identifier? Bitfocus will confirm

Housing Inventory Count (HIC) / Point In Time (PIT) Count

This month's action items

- For all projects, review number of clients served in the "PIT Count" column of **THIS SPREADSHEET** for accuracy
  - Reminder: this year, the number of clients for PSH is based on Housing Move-In Date
  - Review the Utilization rate
  - If the number is highlighted in red, the Utilization rate is either very low or very high
    - If the number accurate, write a comment to let us know why
    - If the number is not accurate, check HMIS and make any needed updates – let Bitfocus know and we will rerun the number
  - If you haven't already, review the rest of the columns on the spreadsheet
  - If any information is not accurate, write a comment on the spreadsheet with the correct information
- For RRH projects, review the bed/unit inventory. The number of beds/units in columns M through W should match the number of clients/households housed in your project the night of **Wed, Jan 24**
  - Utilization rate for RRH projects will always be 100%
- Bitfocus will reach out to verify address information for all projects:
  - For site-based projects: full address is needed
  - For scattered-site projects: zip code where most units are located
- Bitfocus will reach out if there are any specific questions for your agency

Please complete your review by **Monday, March 12** and let Bitfocus know once it's been completed

Continuous Data Quality Improvement (CDQI)

- Continue regular review of entries/exits
  - Helpful report: [GNRL-106] Program Roster Report
- For agencies with ES, TH, RRH, PSH – continue review of HIC and PIT information
- For agencies not participating in HIC and PIT – check Data Accuracy
  - Helpful report: [GNRL-220] Program Details Report

Q&A

- Reminder: Technical Administrators should be the ones to request new user accounts for their agency
- RRH- what should you do if a client is referred when your working with the referral, the client got a new assessment and new assessment score?
  - Check in with Jessica from OSH
- If client is already enrolled in your RRH program, make sure to complete the SPDAT

Time available for HIC/PIT review