



# ***WELCOME!***

AGENCY ADMIN. MEETING  
THURSDAY, JANUARY 2ND, 2020



## *Getting To Know You Question:*

Aside from necessities, what one thing could you not go a day without?



# AGENDA

- COC|Coordinated Assessment|UPLIFT Updates
- HMIS Newsletter
- Customization of HMIS – Feature Enhancements – *Next Steps*
- Breakout Session – *A Year in Review*
- Monitoring & Security Officer Elements
- Annual Client Privacy Recertification Process
- Reminders

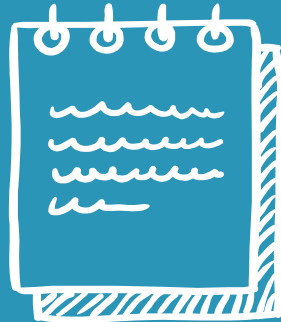
# *COC*

## *Coordinated Assessment*

### *UPLIFT Updates*



# *HMIS Newsletter*



# HMIS NEWSLETTER

Santa Clara HMIS News, December 2019

In this edition you'll find the following:

- 2020 Point-in-Time and Housing Inventory Counts
- Data Quality Fields: What They Are and Why They Matter
- From the Help Desk...
- Report Spotlight: 2019 In Review
- Upcoming Events





# *Customization of HMIS Feature Enhancements*



## *Next Steps*



# CUSTOMIZATION OF HMIS FET - NEXT STEPS

Request Item	1 Rank	2 Rank	3 Rank	4 Rank	5 Rank	Weighted Total	
Automatic Refer to Queue	3	3	3	3	3	100.0%	
Contact Information of staff who touched client last	5	5	5	5	5	100.0%	1
Number of Assigned Staff	3	2	3	3	3	90.0%	2
Alerts when new assessment is needed with customizable time lengths	4	4	4	3	3	86.7%	
Ability to run a canned report once and export separate reports at agency and program level	2	3	4	4	3	73.3%	3
Follow-up Notification for staff who touched the client last	3	2	2	4	4	66.7%	5
Allow for just one date entry on the case management service	2	3	2	2	2	60.0%	
Looker Dimension to Compare the Change in Income at Entry/Status/Exit	3	1	3	3	4	60.0%	
Automation of HMIS to change the previous End Date of an ROI when uploading (entering) a New/Revised ROI	4	2	3	3	4	55.0%	
See more than 5 recent clients (search history)	3	4	1.5	4	3	52.5%	
Alerts for incongruent changes	2	3	3	2	2	46.7%	4
Have customizable status note on the queue tab	2	1	2	2	2	40.0%	
Allow Mass Mark As Read/Delete for Inbox	2	3	4	2	2	40.0%	
PDF Report drill down option	4	2	1	2	1	33.3%	
Star Favorite Reports	1	4	2	1	2	33.3%	
Ability to undo "remove from queue"	1	2	1	1	1	10.0%	
Hide recently searched clients	1	1	1.5	1	1	2.5%	
ISP case management functionality	1	1	1	1	1	0.0%	
Notice on Profile if Client is Deceased	1	1	1	1	1	0.0%	



# CUSTOMIZATION OF HMIS FET – NEXT STEPS

We will move forward with scoping the highlighted Feature Enhancements with the Bitfocus Development Team:

- 1) Contact Information of staff who touched client last
- 2) Number of Assigned Staff
- 3) Ability to run a canned report once and export separate reports at agency and program level
- 4) Alerts for incongruent changes
- 5) Follow up notification for staff who touched client last

Items not chosen for 2019 this round will be reviewed again mid-year.

Please continue to submit your feature enhancement ideas to the [Virtual Suggestion Box](#).

*Stay tuned for updates!*

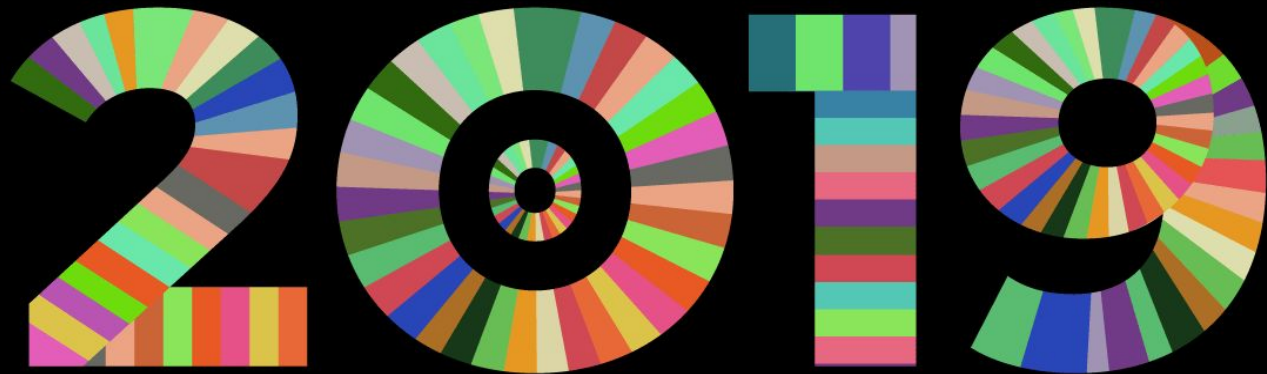




# *Breakout Session*

## *“Year in Review”*





2019

YEAR IN REVIEW



# *Monitoring & Security Officer Elements*



# MONITORING & SECURITY OFFICER ELEMENTS

The Partner Agency Technical Administrator and Security Officer Agreement requires a Partner Agency to identify a Technical Administrator and a Security Officer. We often refer to the people in these roles collectively as Agency Administrators (Agency Admins or Agency Leads).

Many agencies choose to designate the same person as Technical Administrator and Security Officer, however, the Security Officer has distinct responsibilities listed on page 2 of the Partner Agency Technical Administrator and Security Officer Agreement.





## SECURITY OFFICER RESPONSIBILITIES

The Partner Agency Security Officer is responsible for:

- Conducting a complete and accurate quarterly review of the Partner Agency's compliance with all applicable plans, forms, manuals, standards, agreements, policies, and governance documents;
- Completing the SCC HMIS Quarterly Compliance Certification Checklist (the "Checklist"), and forwarding the Checklist to the HMIS Lead Agency and the System Administrator, as defined therein;
- Continually monitoring and maintaining security of all staff workstations used for SCC HMIS data entry;
- Safeguarding client privacy by ensuring Partner Agency and Partner Agency End User compliance with all applicable confidentiality and security policies;
- Investigating potential and actual breaches of either SCC HMIS system security or client confidentiality and security policies, and immediately notifying the County and the System Administrator, as defined in the Checklist, of substantiated incidents;
- Developing and implementing procedures for managing new, retired, and compromised local system account credentials;
- Developing and implementing procedures that will prevent unauthorized users from connecting to any private Partner Agency networks;
- Ensuring all Partner Agency End Users sign and execute the SCC HMIS End User Agreement and retaining records of all signed SCC HMIS End User Agreements; and
- Ensuring all Partner Agency End Users complete the SCC HMIS Privacy and Security Training, SCC HMIS Client Consent Training, and the SCC HMIS Workflow Training, as well as all other mandatory trainings; retaining documentation of training completion; and forwarding such documentation to the HMIS Lead Agency.



# MONITORING & SECURITY OFFICER ELEMENTS

Security Officer Responsibilities (from the Standard Operating Procedures):

The Partner Agency Technical Administrator and Security Officer Agreement references a Quarterly Compliance Certification Checklist. This checklist should be completed each quarter by the Security Officer and submitted to [scc-admin@bitfocus.com](mailto:scc-admin@bitfocus.com).

Quarter schedule:

Quarter 1: Jan 1, 2020 – Mar 31, 2020

Quarter 2: Apr 1, 2020 – June 30, 2020

Quarter 3: Jul 1, 2020 – Sep 30, 2020

Quarter 4: Oct 1, 2020 – Dec 31, 2020

The Quarterly Compliance Certification Checklist



# QUARTERLY COMPLIANCE CHECKLIST REVIEW

1. An HMIS Privacy Statement is visibly posted at each HMIS workstation ([Located on http://scc.hmis.cc/client-forms/](http://scc.hmis.cc/client-forms/)).
2. Each HMIS workstation computer is in a secure location where only Authorized Persons have access.
3. Each HMIS workstation computer is password-protected and locked when not in use. (Changing passwords on a regular basis is recommended)
4. Documents printed from HMIS are sent to a printer in a secure location where only Authorized Persons have access.
5. Non-authorized persons are unable to view any HMIS workstation computer monitor.
6. Each HMIS workstation computer has antivirus software with current virus definitions (i.e., within the past twenty-four (24) hours), and each HMIS workstation computer has had a full system scan within the past week.

## QUARTERLY COMPLIANCE CHECKLIST REVIEW (CONT.)

7. Each HMIS workstation computer has and uses a hardware or software firewall.
8. Unencrypted protected personal information (“PPI”) – defined as client-level identifying information, including, without limitation, information about names, birth dates, gender, race, social security number, phone number, residence address, photographic likeness, employment status, income verification, public assistance payments or allowances, food stamp allotments, or other similar information – has not been electronically stored or transmitted in any fashion (including, without limitation, by hard drive, flash drive, email, etc.). (Encrypted hard drives are recommended)
9. Hard copies of PPI (including, without limitation, client files, intake forms, printed reports, etc.) are stored in a physically secure location.
10. Each HMIS workstation computer password information, including each Authorized Person’s user



# *Annual Client Privacy Recertification Process*



# ANNUAL CLIENT PRIVACY RECERTIFICATION PROCESS

Every year, HMIS users are required to retake the SCC HMIS Client Consent training to comply with HMIS Privacy Standards as stated in the End User Agreement.

Recertification will take place for all HMIS users in January.

To recertify, HMIS users will need to rewatch the Client Consent Training, complete the quiz, and sign the electronic End User Agreement.

The training is available now on the SCC HMIS website:

<http://scc.hmis.cc/training/schedule-a-training/>

Please complete the training by January 24th, 2020.

On Wednesday, January 29th, 2020, a new Electronic End User Agreement will appear when you log in. By completing the electronic USER POLICY AGREEMENT you are confirming that you have watched the video and have re-certified.





# RECERTIFICATION FORM: PREVIEW

To recertify *End Users* will be required to do the following:

1. Log in to HMIS
2. An electronic user agreement will appear – *read the form*
3. Sign the agreement and click “Apply”
4. Click “Save”

## USER POLICY AGREEMENT

STATE OF UTOPIA

COMMUNITY AND HOMELESS MANAGEMENT INFORMATION SYSTEM (HMIS)

USER POLICY AND RESPONSIBILITY STATEMENT – CODE OF ETHICS

User Policy

Participating agencies shall share information for provision of services to their clients through a networked infrastructure that establishes electronic communication among the participating agencies.

Participating agencies shall at all times have rights to the data pertaining to their clients that was created or entered by them in the Utopia HMIS. Participating agencies shall be bound by all restrictions imposed by clients pertaining to the use of personal data.

I understand and agree to comply with all the statements listed above:

RESET

APPLY

Sign here

This form may not be amended except on approval of the HMIS Working Group.

Click Apply

Click “Save”

SAVE





# *Reminders*



## REMINDERS – Agency Admin. Attendance

- ◀ Please recall that you are required to attend 7/11 in-person Agency Admin. meetings
- ◀ Starting in **February** there will be 9 opportunities left to ensure you meet this requirement
- ◀ If you cannot attend, please send a representative in your place (must have current HMIS access)

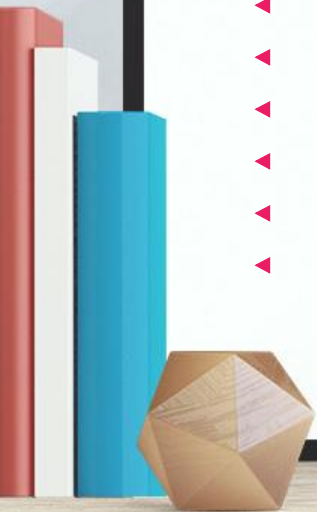


# REMINDERS – HIC & PIT

The **Housing Inventory Count (HIC)** is conducted annually.

Report is on shelter and housing programs (ES, TH, RRH, PSH), including non-participating HMIS programs (e.g. DV programs) and includes:

- ◀ Bed/unit capacity
- ◀ Federal funding source
- ◀ HMIS participation
- ◀ Location (geocode and address)
- ◀ Other project details
- ◀ Utilization rate based on clients in shelter/housing during one night in January (point-in-time count)



# REMINDERS – HIC & PIT

The **Point In Time (PIT) Count** is conducted annually in late January, on the same day as the HIC

The report includes sheltered clients (ES, TH, Safe Haven), including clients in non-participating HMIS programs (e.g. DV programs):

- ◀ Number of households and clients served the night of the PIT
- ◀ Number of children, adults aged 18–24, adults over 24
- ◀ Race, Ethnicity, Gender, Chronic Homelessness
- ◀ Substance Abuse, Mental Illness, DV, HIV/AIDS

Information is broken out by both household type as well as specific demographics (Veterans, Parenting Youth, Unaccompanied Youth).

*\*Unsheltered PIT counts are conducted every other year. This year, 2020, there is no unsheltered PIT count.*



# REMINDERS – HIC & PIT Canned Reports

*Please note someone from the Bitfocus Administrative Team will be contacting you regarding any questions that may come up. Please be sure and respond as soon as you are able to.*

## Useful Reports and Resources

[HUDX-225] HMIS Data Quality Report

[Notice CPD 2019 HIC/PIT Data Collection Notice](#)

[HMIS Bed Inventories, Occupancy and Reporting](#)

[HUD's announcement and resources for the 2020 HIC/PIT count](#)





# REMINDERS – Office Hours

## Where Are Office Hours Held?

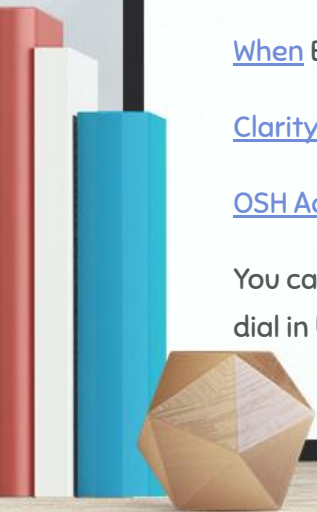
[Looker Office Hours](#) are conducted from the comfort of your own office! Each Office Hours session is hosted online by your Santa Clara County Clarity System Administration team. You can connect using your computer (recommended so that you can see demos and post questions) and/or dial in by phone using the following [Zoom \(click here to access\)](#)

[When](#) Every other Monday of the month from 2:00pm–3:00pm

[Clarity \(HMIS\) Office Hours](#) will take place at OSH every other Thursday from 10:00am–1:00pm

[OSH Address](#) TBD

You can connect using your computer (recommended so that you can see demos and post questions) and/or dial in by phone using the following [Zoom \(click here to access\)](#)





## REMINDERS – Bitfocus Communications

Some of you may have received CES Data Quality correspondence regarding VI-SPDAT's created in December 2019 that are missing Referrals.

Please be sure and do any follow-up and/or corrections as requested.



# REMINDERS

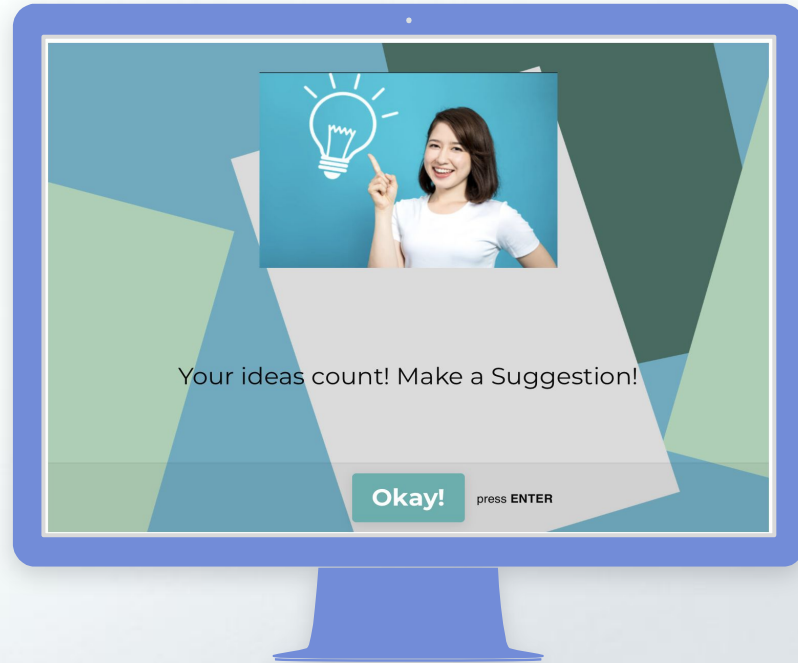
## SCC Virtual Suggestion Box

Have ideas about an enhancement and/or addition to HMIS?

Want to volunteer you agency for an upcoming Agency Admin. Meeting?

Let us know! Drop it in the box!

[Virtual Suggestion Box](#)



# *Next Months Meeting*



Thursday, February 6th, 2020



2:00 pm – 3:30 pm



Location to be determined

# Questions, Comments, & Concerns?



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