

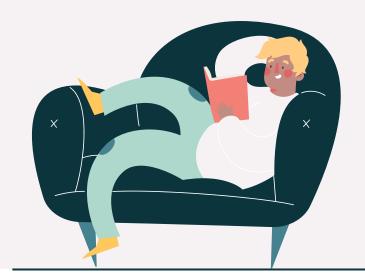


Agenda Items

- 1. CoC Coordinated Assessment UPLIFT Updates
- 2. HMIS Newsletter
- 3. Feature Enhancements Follow Up
- 4. LSA Updates
- 5. Quiz Time
- 6. Data Quality Agency Lead Guides
- 7. ROI Compliance Review
- 8. Security Officer Checklist Updates
- 9. Reminders

Getting to Know You!

During Shelter in Place (SIP), what new interesting hobby have you picked up? Or have time to do because of SIP.











CoC|Coordinated Assessment| UPLIFT Updates











- 2020 Community Plan to End Homelessness was approved by the CoC board and the CoC is seeking endorsements. The Lived Experience Advisory Board endorsed the plan in July. On August 25th, the County Board of Supervisors and the City of San Jose City Council endorsed the plan. If any groups with which you are involved are interested in endorsing or would like to request a presentation, please contact Kathryn
- CoC NOFA We still have not heard any update from HUD regarding the 2020 NOFA. The local competition is on hold until we hear more.

COVID Response – The CoC continues to work on COVID response efforts such as:

- a. Shelter hotline operating M-F and offering referrals to congregate shelter and hotels (for those who are medically vulnerable and require non-congregate shelter)
- b. The City of San Jose is opening 4 emergency interim housing communities, the first of which began move-ins this week. These temporary housing opportunities are being prioritized for people who are vulnerable to complications from COVID (over 65 or have multiple underlying conditions).
- c. Mass testing at congregate shelters and encampments over 10 people continues. VHHP is offering testing at these sites monthly.
- d. Housing Problem Solving is being implemented across congregate and non-congregate shelter sites. Training is being provided by the County. Additional training opportunities for housing problem solving specialists are upcoming, dates TBD.

Upcoming meetings

- i. CAWG Thursday, Sept 10, 1-2:30pm
- ii. SPN is starting back up, please keep your eye out for meeting announcements on the CoC and SPN listserve
- iii. Upcoming CoC Membership meeting date TBD, likely early October
- iv. Point-in-Time Count First Planning Committee Meeting Wednesday, Sep 16, 2020, 1:30pm



UPLIFT Updates





UPLIFT Updates

Please note that current VI-SPDAT's are required for all UPLIFT clients in HMIS in accordance with the requirements for all other clients.

Over the next few months, we'll be checking HMIS to ensure there are current VI-SPDAT's in place for all homeless clients for whom an UPLIFT pass request is submitted.

We'll have a "grace period" during which we'll send email reminders to requestors over the next month or so, after which **UPLIFT requests for homeless clients will no longer be fulfilled without a current VI-SPDAT.**



UPLIFT Updates

Complete a new VI-SPDAT assessment when:

- 1. One year has passed since the last assessment, or
- 2. There has been a life event/change in the client's circumstances that substantially impacts the household's vulnerability.

Each time you meet with a client who already has a VI-SPDAT in HMIS:

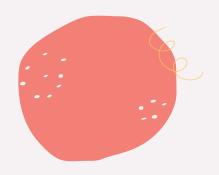
- * Review the latest VI-SPDAT briefly with them to check for significant changes
 - CONDUCT A NEW VI-SPDAT if there are such changes
- * Ensure their contact information is current, thorough, and accurate
 - If there are changes, be sure to update the contact and/or location tabs!



HMIS Newsletter



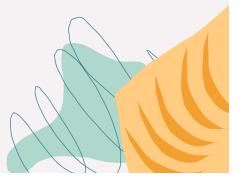




HMIS Newsletter

Topics Discussed this Month

- The LSA Is Coming Soon, Start Your Cleanup Now!
- Adult or Child? Ensure Your Clients Are Counted with the Approximate Birth Year
- Don't Forget, Help is Available
- Report Spotlight: [EXIT-101] Potential Exits
- Upcoming Events

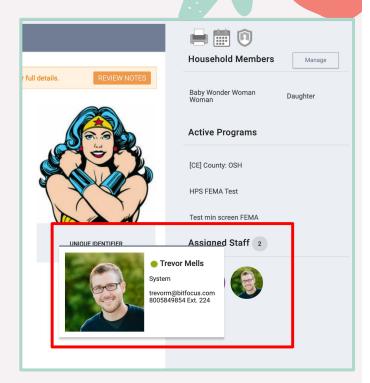




Feature Enhancement Update

New Feature: Assigned Staff Contact info Display

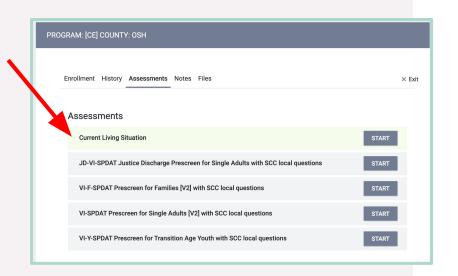
- Assigned staff contact info (email/phone) displays when clicking on initials.
- REMINDER: All users should add accurate contact info in their account settings.



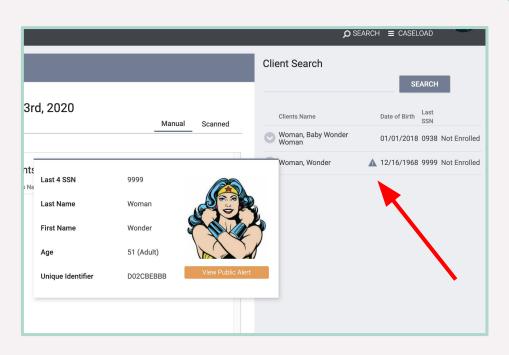
New Feature: Current Living Situation (CLS) Assessment Top of List

REMINDER:

- Complete CLS Assessment for Outreach, CE, and ES
- Complete at project start, CE
 Assessment, Significant
 Contact, OR Housing Situation
 Change



New Feature: Public Alerts Display in the Attendance Module





LSA: Longitudinal System Analysis







Report Overview

The LSA is designed to provide a systems level picture of how people experiencing homelessness access assistance options.

- The report is due in late Nov/early Dec and covers the federal fiscal year of 10/1/18 9/30/19.
- Includes five project types: ES/SH/TH (reported as a combined group), RRH, and PSH.
- Report includes data on demographics, length of time homeless, information on specific populations such as veterans and chronically homeless persons, housing outcomes.
- Includes not just the federal fiscal year, but includes some historic data prior to the FY as well.

Data Quality Prep



Reporting period: October 1, 2018 - September 30, 2019. Please review by October 15, 2020.

Review data quality for each project type, paying special attention to:

- HoH designation and family/group enrollments (any kids enrolled by themselves?)
- Duplicate or erroneous enrollments (ask the Help Desk to delete!)
- Missing data/no exit interview (high missing rates cause errors in reporting process)

Helpful Reports

[HUDX-225] HMIS Data Quality Report: what's missing?

[GNRL-106] Program Roster: who's enrolled by themselves vs. in group?

[GNRL-220] Program Details Report: what data has been entered?

[EXIT-101] Potential Exits: who's inactive and could be exited?



Quiz Time







Data Quality (DQ) Agency Lead Guides



Data Quality (DQ) Agency Lead Guides

Accuracy of data largely depends on timeliness, particularly

if the collection of data doesn't happen directly within the

HMIS. As you enter HMIS data, you may be relying on

handwritten notes or your own recall of a case

management session, service transaction, program entry or

Set a goal to transfer data from notes or memory into the

HMIS within 24 hours of intake, increasing the chances the

data will be correct. This also ensures data is entered as close to real-time as possible, making it accessible when

Be Proactive in Monitoring

Being proactive is key. Don't wait until there are

problems before you start paying attention to

Data Quality Tips

HUD defines data quality as referring to the reliability and validity of client-level data collected in the HMIS. It's measured by the extent to which the client data in the system reflects actual information in the real world. With good data quality, communities can "tell the story" of the population experiencing homelessness.

It's clear that good data quality is important to ending homelessness. But achieving this standard can be challenging due to factors such as quality of HMIS software, truthfulness of the client, question and answer interpretation, staff training, language differences, and more.

Here you will find various resources to compile a list of ideas you can put into action to ensure better quality of HMIS data. We have also highlighted a few reports we think are great resources for data quality.

Develop HMIS DO Plan

First and foremost, the best way to ensure good data quality is to have a data quality plan is a set of policies and procedures that facilitates the ability to achieve complete, accurate, and timely clientlevel data. It lays out data quality goals, the steps necessary to measure progress toward those goals, and the roles and responsibilities for making sure HMIS data is reliable and value.

Training of Staff

Having trained staff means they are aware of any changes, are learning new skills, reducing the amount of data entry errors and building their confidence in using

Create & Maintain BNL

Many communities are recognizing the need to develop, maintain, and use a by-name list (BNL), a continually updated snapshot of all individuals experiencing homelessness. A BNL can include categories such as Veteran status, chronic status, active/inactive status, homeless/housed status, and more.

Helpful Data Quality Tips for Agency Leads

The secret of staying ahead is getting started. Mark Twain



get.clarityhs.help/hc/en-us

800.594.9854



Enter HMIS Data Within 24 Hours of Intake DATA QUALITY TIPS Mini Guide

REPORT LIBRARY

The Assessment Details report lists all the responses to the questions on the selected assessment. The responses for each client are included.

The Agency Management Reports help in tracking what your staff are doing in the system and what client level data they have entered/modified.

Client Enrollment Details provides information on client responses to questions about their history of homelessness as well as move-in and destination at exit information. These details can help determine additional periods of homelessness for clients.

The Monthly Staff Report provides three categories of information:

• General data quality/User Activity /Data quality by data element Includes staff from other agencies with "additional access" to the reporting agency data.

[DQXX-110AD] Will be discussed further below.

[HSNG-104] Monthly Housing Report is an enrollment-based report intended to serve as a one complete month review of housing programs. This report breaks down by project type.

Housing Move-in Date is discussed further

[HUDX-223] The Client-Level System Use & Length of Time Homeless Report is designed to provide a general summary of information in an individual client's HMIS history that is relevant to chronic homelessness.

[HUDX-225] Will be discussed further below

The Program Details Report returns all the fields and corresponding responses fo selected screens. Additionally, the repor provides some profile and Housing Service information, depending on the screen selected.



REPORT SPOTLIGHT: [HUDX-225] HMIS Data Quality Report

Looking for a report that is the gold standard when it comes to pulling data? Look no further! This report provides a plethora of data that will point you in the right direction of where you should tackle data quality. It will help identify data that is missing or incomplete, issues with household configuration, and clients who may be missing an annual assessment.

Additionally, this report pulls clients who are missing data elements used to determine Chronic Homeless status (section Q5), compliance with local data entry timeliness (section Q6), and number of inactive records (sectionQ7).



Check out these Guides here!



Release of Information (ROI) Compliance Review





ROI Compliance Review

- 1) Client Consent/Release of Information may be collected electronically by a County-approved technology such as Docusign. *Verbal Consent is never permitted.*
- 2) Ensure you are using the most recent version on the ROI.
- 3) Ensure the ROI is complete and accurate- initial boxes, signatures, and dates.
- 4) For clients requesting assistance by phone, service providers should first search for an active profile and valid ROI in HMIS.
- 5) The VI-SPDAT may be conducted remotely after obtaining the signed client consent form.
- 6) HMIS Intake may be conducted remotely and client signatures are not required.

Temporary Guidance for HMIS Data Entry During the COVID-19 Emergency

ROI Completion Instructions

<u>Click here to be routed to where this</u> <u>is located on the website.</u>



CLIENT CONSENT TO DATA COLLECTION AND ROI

Page 2 of 6

AGREEMENT TO EXECUTE USING ELECTRONIC SIGNATURE: I understand and intend that my electronic signature and electronic initials on this form shall have the same force and legal effect as if signed or initialed with an original ink signature. I represent, warrant, and agree that my signature and initials, whether in electronic or original ink, shall give rise to a valid, enforceable, and fully effective consent and agreement.

BY SIGNING THIS FORM, I AUTHORIZE THE FOLLOWING:

I authorize the County, Bitfocus, the CoC, the Partner Agencies, and their authorized
agents and representatives to collect, use, and share basic information about me.

Check for any missing initials and verify with client that they do not consent to sharing that information. NOTE: if the client does not initial the "Housing Information box, they cannot be referred to a housing program via the community queue

ne Partner Agencies may change over time, and that a current list of las been provided to me. I also understand that I may request an time or view the list at: http://scc.hmis.cc/partner-agencies.html. I le collection, use, and release of this information is for the purpose of s for housing, counseling, food, utility assistance, or other services.

pace(s) in the table below, I authorize that the information or records entered into SCC

HIVID may recommend the following specific types of protected personal information ("PPI") and protected health information ("PPI"). If entered in the specific type of information to be entered.

Client initials	Type of PPI/PHI
	 Identifying information (including: name, birth date, gender, race, ethnicity, social security number, phone number, residence address, or other similar identifying information)
	My photograph or other likeness
	Medical information included in my responses to questions asked as part of the standard HMIS intake and identification as a client or patient of the Santa Clara Valley Health and Hospital System.

Temporary Guidance Reminders

(click the pics go to the full guidance)





Santa Clara County Continuum of Care



Temporary Guidance for Homelessness Prevention Providers During the COVID-19 Emergency

Effective 3/11/2020

The County of Santa Clara Office of Supportive Housing, acting as the Continuum of Care and HMIS lead agency, has enacted the following operational changes related to the Homelessness Prevention System. The CoC recognizes that many individuals in need of homelessness prevention assistance may be concerned about meeting with service providers in person, either because they are displaying symptoms of the COVID-19 virus or they or the family members are at risk. These changes will be in effect until further notice.

- Client Consent/Release of Information may be collected electronically. Before
 entering personally identifiable information (PII) into HMIS, including client profile data
 and the PR-VI-SPDAT, client consent must be obtained. Please use the revised Client
 Consent/ROI form, which includes a clause related to electronic signatures.
 - Electronic signatures must be obtained using a County-approved technology that complies with California's E-sign Act, such as Docusign. If using a technology other than Docusign, please contact Kathryn Kaminski at Kathryn.kaminski@hhs.sccgov.org to obtain approval.
- The PR-VI-SPDAT may be conducted remotely. After gaining client consent to collect data, providers may conduct the assessment over the phone for individuals who prefer to do so.
- 3. For clients requesting assistance by phone, service providers should first search for an active profile and valid ROI in HMIS. If an active, valid ROI is already uploaded in HMIS, the provider may conduct the PR-VI-SPDAT over the phone and enter the information collected in HMIS. If no ROI exists or the ROI on file is expired, the provider should send a new ROI (version 2020-03-11) to the client for e-signature using County-approved technology. Once signed, the ROI must be uploaded in HMIS before entering the PR-VI-SPDAT.
- All other policies and procedures related to homelessness prevention assessments remain unchanged.

CLIENT CONSENT TO DATA COLLECTION AND ROI

Page 2 of 6

AGREEMENT TO EXECUTE USING ELECTRONIC SIGNATURE: I understand and intend that my electronic signature and electronic initials on this form shall have the same force and legal effect as if signed or initialed with an original ink signature. I represent, warrant, and agree that my signature and initials, whether in electronic or original ink, shall give rise to a valid, enforceable, and fully effective consent and agreement.

BY SIGNING THIS FORM, I AUTHORIZE THE FOLLOWING:

- I authorize the County, Bitfocus, the CoC, the Partner Agencies, and their authorized agents and representatives to collect, use, and share basic information about me. I understand that the Partner Agencies may change over time, and that a current list of Partner Agencies has been provided to me. I also understand that I may request an updated list at any time or view the list at: http://scc.hmis.cc/partner-agencies.html. I understand that the collection, use, and release of this information is for the purpose of assessing my needs for housing, counseling, food, utility assistance, or other services.
- By initialing one or more of the space(s) in the table below, I authorize that the
 information or records entered into SCC HMIS may include the following specific types
 of protected personal information ("PPI") and protected health information ("PHI"). If I
 do not initial one or more space(s) in the table below, I do not authorize the specific
 type of information to be entered into SCC HMIS:



Security Compliance Checklist Updates





Security & Compliance Checklist New Schedule & Deadlines

- Submit Security Compliance certification for all staff annually by Jan 31st
- First Submission will be due Jan
 31, 2021 for all Partner Agencies
- Quarterly Submissions Due for New Staff and Workstations
 Each Quarter

Appendix B: Quarterly Compliance Checklist

SANTA CLARA COUNTY HMIS	☐ Quarter 1	HMIS Partner Agency Name :
QUARTERLY COMPLIANCE	☐ Quarter 2	
CERTIFICATION CHECKLIST	☐ Quarter 3	Security Officer Name:_
	□ Quarter 4	Date:

Workstation Security Standards

In partnership with Santa Clara County, Clarity Human Services Software, a division of Bitfocus, Inc., administers the County's Homeless Management Information System ("HMIS"), a shared database software application which confidentially collects, uses, and releases client-level information related to homelessness in the County. Client information is collected in the HMIS and released to nonprofit housing and services providers (each, a "Partner Agency," and collectively, the "Partner Agencies"), which use the information to improve housing and services quality. Partner Agencies may also use client information identify patterns and monitor trends over time; to conduct needs assessments and prioritize services for certain homeless and low-income subpopulations; to enhance inter-agency coordination; and to monitor and report on the quality of housing and services. This Compliance Certification Checklist is to be completed and certified quarterly by the Partner Agency Security Officer for the HMIS Partner Agency named above according to the schedule outlined below. Each Agency workstation used for HMIS data collection, data entry, or reporting must be certified compliant. Any identified compliance issues must be resolved within thirty (30) days. Upon completion, the original signed copy of this checklist should be retained in the records of the HMIS Partner Agency named above for a minimum of seven (7) years. Additionally, a copy should be made available the SCC Bitfocus System Administration team (the "Lead Security Officer") at Clarity Human Services Software, a division of Bitfocus, Inc.

Compliance Certification Schedule:

•	Quarter 1 (due by April 30th):	New HMIS users or workstations created in Q1 (Jan-Mar)
•	Quarter 2 (due by July 31st):	New HMIS users or workstations created in Q2 (Apr-June
•	Quarter 3 (due by October 31st):	New HMIS users or workstations created in Q3 (June-July

Quarter 4 (due by January 31st): ALL Active HMIS Users and Workstations

Security & Compliance Checklist

Process Updates

- New self certification form available
- Security Officer should sign and submit the quarterly checklist
- Security Officer does not need to be onsite to oversee monitoring process

SANTA CLARA COUNTY HMIS QUARTERLY COMPLIANCE CERTIFICATION CHECKLIST SELF CERTIFICATION FORM

Staff Name:	
Workstation Location:	
HMIS Partner Agency Name:	
Date Completed:	

<u>Instructions:</u> Use this form to Self-Certify that you meet the SCC HMIS Workstation Security Standards below at your workstation.

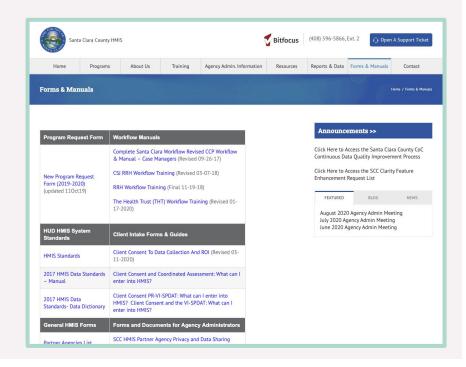
This form should be completed and submitted to your agencies' Security Officer for review.

++-		
#	Staff Initials	Workstation Checklist Items
1		An HMIS Privacy Statement is visibly posted at each HMIS intake desk (or comparable location). If the workstation is not in a fixed location HMIS Privacy Statement must be provided as a handout.
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.
7		Each HMIS workstation computer has and uses a hardware or software firewall.
8		Unencrypted protected personal information ("PPI") ** 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 identification information, is kept electronically and physically secure

Security & Compliance Checklist

Additional Info

- Forms Available on the HMIS Website
 - http://scc.hmis.cc/client-forms
- Submit completed forms & questions to scc-admin@bitfocus.com





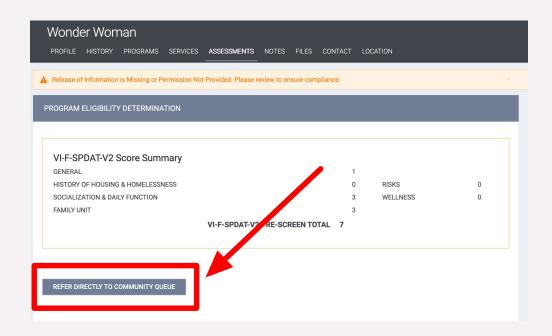
Reminders





Data Quality: Referrals to Community Queue

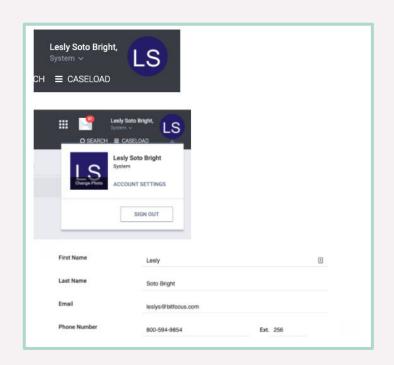
- Refer Clients to the Queue after they receive an assessment
- Score of 4 or more or 3 or more for yets





Update Contact Information in HMIS

- 1. Log into HMIS
- 2. Click on the logo of your initials and/or photo
- 3. Got to ACCOUNT SETTINGS
- 4. In the *Phone Number* field please update your phone number, be sure to include your extension
- 5. SAVE CHANGES when done





Office Hours

Clarity HMIS Office Hours

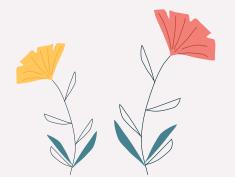
When: Bi-Weekly, Thursday Time: 10:00am - 11:30 am

Looker Office Hours

When: Bi-Weekly, Monday

Time: 2:00pm - 3:00pm



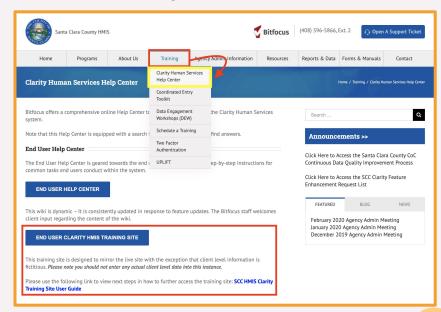




SCC HMIS Training Site

Want to hone your skills at data entry without compromising actual client data?

Use the End User Clarity
HMIS Training Site







Virtual Suggestion Box



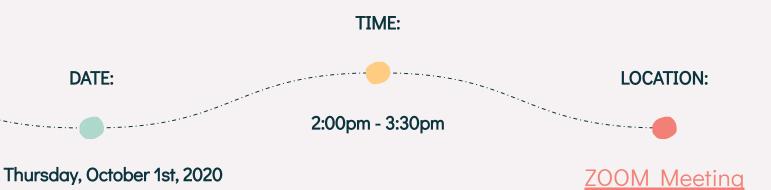
Have ideas about an enhancement and/or addition to HMIS?

Have a general questions you'd like to ask? Let us know! Drop it in the box!



Next Month's Meeting





Your Sys. Admin Team





Janel Fletcher

JanelF@bitfocus.com



Trevor Mells

TrevorM@bitfocus.com



Alison Wilson

AlisonW@bitfocus.com



Lesly Soto Bright

LeslyS@bitfocus.com





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