



# HMIS Agency Administrators Meeting

January 5, 2017

# Agenda

1. CoC/Coordinated Entry Updates
2. UPLIFT Reminders
3. VI-SPDAT Updated Forms Available
4. User Account Review
5. Check-in about CDQI Action Items - Due 1/20
6. Overlapping Housing Services
7. Client Summary Report & Calendar
8. Inclement Weather Data Tracking Reminder



# CoC/Coordinated Entry Updates

# UPLIFT Reminders

Training materials at:

<http://scc.hmis.cc/training/uplift/>

*For new clients:*

Create a program enrollment. The Program Entry Date should be the date you are requesting the UPLIFT pass.

*For returning clients:*

Create a Status Update Assessment. The Assessment Date should be the date you are requesting the UPLIFT pass.

*If a client is not receiving a pass this quarter:*

Please exit them from UPLIFT!

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# VI-SPDAT: Updated Forms Available

VI-SPDAT in Clarity now has 2 additional questions to help with locating the client:

**Is there someone that you trust and communicate with regularly that we can contact when we look for you? (Please include name and phone number if possible)**

**Name and Phone Number of Staff Completing the VI-F-SPDAT**

Printable PDF Forms have been updated to reflect additional questions:

<http://scc.hmis.cc/client-forms/>



# User Account Review

Each Agency will receive an email with their list of active users

Users that have not logged into Clarity in the past 6 months will be deactivated on Friday, 1/13

*Please notify Bitfocus if any other users need to be deactivated as soon as possible*

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# Check-in about CDQI Action Items

Information needed for the Housing Inventory Count (HIC)

Due Date: Friday, 1/20!

# CDQI Action Items

Please review and confirm the information about housing and shelter programs that we previously reported to HUD in [THIS SPREADSHEET](#).

Although the spreadsheet may look intimidating at first glance, we are only asking you to look at a few elements:

1. The names of your program(s)
2. HUD Geo Codes for the geographic area(s) in which your program(s) operate
3. Inventory type (Current, New, or Under Development)
4. TH unit type (for transitional housing programs only)
5. ES bed type (for emergency shelter programs only)
6. Target populations
7. Whether you receive McKinney-Vento Funding
8. Whether you receive other federal funding



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# Keep the following in mind while reviewing:

- Let us know if any new housing or shelter programs have come online during calendar year 2016
- Similarly, let us know if any programs on our list have stopped operating during calendar 2016.
- Please leave a comment in any cell where information needs to be changed (Bitfocus will make the actual change, using the information from your comment)
- Lastly, please tell us when you have completed your review of the spreadsheet.

# Overlapping Housing Services

In general, Clarity does not allow overlapping housing services

One exception: if a client checks into a shelter using the Attendance tool

## Discussion topic for the group:

*Proposed policy: if there are conflicting housing services, use the most recent housing service*



# Client Summary Report & Calendar

These 2 items are potentially useful features available in Clarity

## **Client Summary Report:**

Shows information about client's history in Clarity

## **Calendar:**

Allows you to schedule client appointments and reminds you of upcoming annual assessments due



# Client Summary Report

Cherry Blossom

Profile Services History Programs Assessments Notes Files Location Referrals

Jenn Test2, Jenn Training Agency

Search Caseload

**1. Go to client's Profile tab**

### CLIENT REPORTS

[CLNT-101] Case Notes	<a href="#">Run</a>   <a href="#">Schedule</a>
[CLNT-103] Photo ID Card - Sample	<a href="#">Run</a>   <a href="#">Schedule</a>
[CLNT-104] Profile Screen	<a href="#">Run</a>   <a href="#">Schedule</a>
[CLNT-102] Client History	<a href="#">Run</a>   <a href="#">Schedule</a>
[CLNT-105] Client Appointments	<a href="#">Run</a>   <a href="#">Schedule</a>
[CLNT-125] Client Summary	<a href="#">Run</a>   <a href="#">Schedule</a>

Household Members [Manage](#)

Apple Blossom Daughter

Active

**2. Click on Printer Icon**

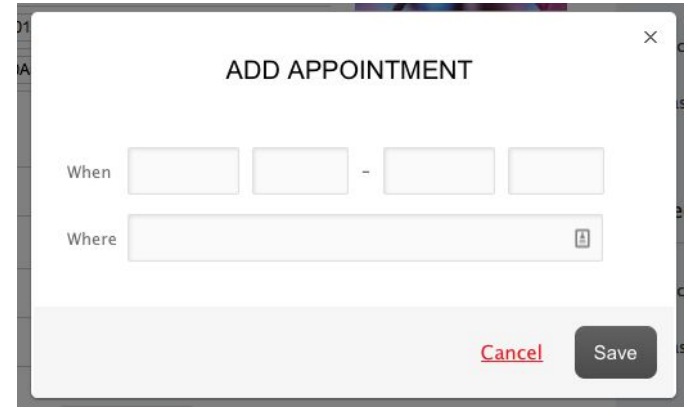
**3. Find Client Summary report and click "Run"**

Supportive Housing] PSH...  
Security Deposit

# Calendar

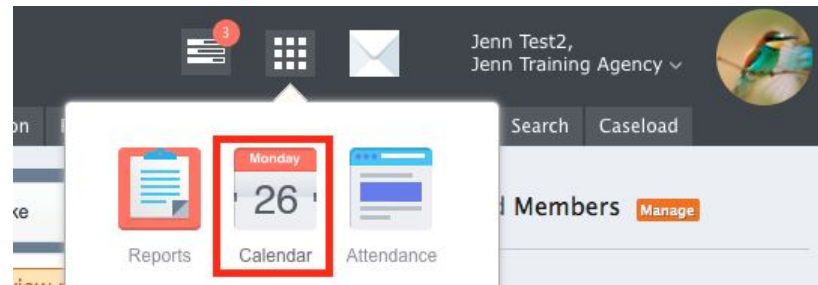
## To schedule appointment:

- Go to client's Profile screen
- Click on Schedule Appointment icon
- Complete Add Appointment details



## To access the Calendar:

- Click Launcher icon, then Calendar icon





# Inclement Weather Data Tracking

- Inclement Weather Programs are available in Clarity for participating agencies
  - Tracking data in Clarity is optional
  - Agencies who decide to track Inclement Weather clients in Clarity should follow instructions provided by Bitfocus
- As in past years, agencies will need to submit their Inclement Weather numbers to Bob Dolci