

WELCOME!



AGENCY ADMIN. MEETING
THURSDAY, OCTOBER 3RD, 2019



GETTING TO KNOW YOU!

Your Name
Your Agency

What did you want to be
when you were a child?

AGENDA



AGENDA



COC|Coordinated Assessment|UPLIFT Updates



HMIS Newsletter



Breakout Groups



HUD 2020 Data Standards



Continuous Data Quality Improvement



Customization of HMIS|Feature Enhancements



Reminders



Next Months Meeting

CO|COORDINATED ASSESSMENT|UPLIFT UPDATES



HMIS NEWSLETTER



HMIS NEWSLETTER



September Newsletter Covered the following items:

- 📰 Reminder: Data Standards Changes Coming October 1st
- 📰 Update the Contact and Location Tabs
- 📰 Best Practices for Sharing PII (Protected Personal Information)
- 📰 Report Spotlight: [DQXX-110] Duplicate Clients
- 📰 Upcoming Events

Web link to the Newsletter will be available in the Agency Admin meeting minutes

BREAKOUT GROUPS



SCENARIO #1

A new staff person is onboarding and will be doing HMIS data entry. What are the next steps that you need take as the Agency Lead to ensure this staff person is granted access to HMIS?

The diagram consists of four overlapping circles arranged horizontally. The first circle is orange, the second is purple, the third is blue-grey, and the fourth is brown. Each circle contains a white text label indicating a step in a process.

Step 1?

Step 2?

Step 3?

Step 4?

SCENARIO #2

What are actions/steps that should be taken to help minimize and/or to prevent a data breach?

A diagram consisting of four overlapping circles arranged horizontally. The first circle is light red, the second is light blue, the third is light orange, and the fourth is light teal. Each circle contains a white text label. The circles overlap such that the second circle overlaps the first, the third overlaps the second, and the fourth overlaps the third.

Step 1?

Step 2?

Step 3?

Step 4?

SCENARIO #3

According to the Agency Administrator agreement (Technical Administrator and Security Officer Agreement), how frequently should an agency administrator review data quality at their agency?

(Choose responses that apply)

1. Conduct a complete review daily, or as necessary, dependent on program need
2. As soon as I get a minute, too many meetings to attend
3. Data quality reports should be run at least once per month throughout the year. In the weeks prior to submitting a report, data quality reports may need to be run on a daily basis.
4. Conduct a complete and accurate quarterly review of the Partner Agency's compliance with all applicable plans, forms, manuals, standards, agreements, policies, and governance documents

SCENARIO #4


Identify the data quality errors that are found in this client's profile

Marga Rita

PROFILEHISTORYSERVICESPROGRAMSFILESNOTESASSESSMENTSCONTACTLOCATIONREFERRALS

CLIENT PROFILE

Social Security Number	345 - 34 - 2123	
Quality of SSN	Client doesn't know	▼
Last Name	Rita	🗒
First Name	Marga	
Quality of Name	Client refused	▼
Quality of DOB	Approximate or partial DOB reported	▼
Date of Birth	01/02/1985	Adult. Age: 34
Middle Name	None	▼
Gender	Female	▼
Race	White	▼
Ethnicity	Hispanic/Latino	▼
Veteran Status	No	▼



UNIQUE IDENTIFIER
DF35775B6

SCENARIO #4 CONT.

Continue to review the client's program enrollment and identify any issues that you see

Project Start Date	08/16/2019	📅
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response) ▼	
Is the Program Type Either Emergency Shelter, Safe Haven, or Street Outreach?	Yes (Automatically Generated Response) ▼	
Is the Program Type Either Street Outreach or a Night-by-Night Emergency Shelter?	Yes (Automatically Generated Response) ▼	
COMPLETE DATE OF ENGAGEMENT WHEN CLIENT HAS BEEN ENGAGED		
Date of Engagement	08/19/2019	📅
LIVING SITUATION		
Type of Residence	Place not meant for habitation ▼	
Length of Stay in Prior Living Situation	One week or more, but less than one month ▼	
Approximate Date Homelessness Started	07/16/2019	📅
Number of times on the streets, in ES, or Safe Haven in the past three years	Three Times ▼	
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Two Months ▼	
DISABLING CONDITIONS AND BARRIERS		
Disabling Condition	No ▼	
Physical Disability	No ▼	
Developmental Disability	Yes ▼	Substantially Impairs Independence Client does ▼
Chronic Health Condition	Yes ▼	Long Term Yes ▼
HIV - AIDS	No ▼	
Mental Health Problem	Yes ▼	Long Term Client does ▼
Substance Abuse Problem	No ▼	
Domestic Violence Victim/Survivor	No ▼	

SCENARIO #5

*Please note this client is enrolled in a RRH program with employment assistance. Identify issues that you notice.

Program Enrollment

CASH INCOME FOR INDIVIDUAL	
Income from Any Source	Yes
Earned Income	<input type="checkbox"/>
Unemployment Insurance	<input type="checkbox"/>
Worker's Compensation	<input type="checkbox"/>
Private Disability Insurance	<input type="checkbox"/>
VA Service-Connected Disability Compensation	<input type="checkbox"/>
Social Security Disability Insurance (SSDI)	<input type="checkbox"/>
Supplemental Security Income (SSI)	<input type="checkbox"/>
Retirement Income from Social Security	<input type="checkbox"/>
VA Non-Service Connected Disability Pension	<input type="checkbox"/>
Pension or Retirement Income from a Former Job	<input type="checkbox"/>
Temporary Assistance for Needy Families (TANF)	<input checked="" type="checkbox"/> Amount 714.00 <input type="text"/>
General Assistance (GA)	<input type="checkbox"/>
Alimony and Other Spousal Support	<input type="checkbox"/>
Child Support	<input type="checkbox"/>
Other Cash Income	<input type="checkbox"/>
Total Cash Income for Individual	714.00

Program Exit

CASH INCOME FOR INDIVIDUAL	
Income from Any Source	Yes
Earned Income	<input type="checkbox"/>
Unemployment Insurance	<input type="checkbox"/>
Worker's Compensation	<input type="checkbox"/>
Private Disability Insurance	<input type="checkbox"/>
VA Service-Connected Disability Compensation	<input type="checkbox"/>
Social Security Disability Insurance (SSDI)	<input type="checkbox"/>
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Temporary Assistance for Needy Families (TANF)	<input type="checkbox"/>
General Assistance (GA)	<input type="checkbox"/>
Alimony and Other Spousal Support	<input type="checkbox"/>
Child Support	<input type="checkbox"/>
Other Cash Income	<input type="checkbox"/>
Total Cash Income for Individual	0.00

SCENARIO RESPONSES



SCENARIO #1 RESPONSE

A new staff person is onboarding and will be doing HMIS data entry. What are the next steps that you need take as the Agency Lead to ensure this staff person is granted access to HMIS?

Ensure the staff person completes the required trainings

Trainings include:

1. Clarity General Training
2. SCC HMIS Client Consent Training
3. SCC VI-SPDAT Training

As the Agency Admin. you will need to contact the Helpdesk and make the official request-not the staff person requesting access

Lastly, be sure to include the End User Agreement (PDF) when requesting access

SCENARIO #2 RESPONSE

What are actions/steps that should be taken to help minimize and/or to prevent a data breach?

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

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

SCENARIO #3

According to the Agency Administrator agreement (Technical Administrator and Security Officer Agreement), how frequently should an agency administrator review data quality at their agency?

(Choose responses that apply)

-
- *Data quality reports should be run at least once per month throughout the year. In the weeks prior to submitting a report, data quality reports may need to be run on a daily basis. And in some instances as deemed necessary on program need.*
 - *Conduct a complete and accurate quarterly review of the Partner Agency's compliance with all applicable plans, forms, manuals, standards, agreements, policies, and governance documents*

SCENARIO #3

Additionally, be sure to check for the following:

Completeness

- Are all data sets and data items recorded?

Consistency

- Can we match the data set across data stores?

Uniqueness

- Is there a single view of the data set?

Validity

- Does the data match the rules?

Accuracy

- Does the data reflect the data set?

SCENARIO #4

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Marga Rita

PROFILEHISTORYSERVICESPROGRAMSFILESNOTESASSESSMENTSCONTACTLOCATIONREFERRALS

CLIENT PROFILE

Social Security Number345 - 34 - 2123

Quality of SSNClient doesn't know

Last NameRita

First NameMarga

Quality of NameClient refused

Quality of DOBApproximate or partial DOB reported

Date of Birth01/02/1985Adult. Age: 34


Middle NameNone

GenderFemale

RaceWhite

EthnicityHispanic/Latino

Veteran StatusNo



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HIV - AIDS	No	▼
Mental Health Problem	Yes	▼ Long Term Client does ▼
Substance Abuse Problem	No	▼
Domestic Violence Victim/Survivor	No	▼

SCENARIO #5

*Please note this client is enrolled in a RRH program with employment assistance. Identify issues that you notice.

Program Enrollment

CASH INCOME FOR INDIVIDUAL	
Income from Any Source	Yes
Earned Income	<input type="checkbox"/>
Unemployment Insurance	<input type="checkbox"/>
Worker's Compensation	<input type="checkbox"/>
Private Disability Insurance	<input type="checkbox"/>
VA Service-Connected Disability Compensation	<input type="checkbox"/>
Social Security Disability Insurance (SSDI)	<input type="checkbox"/>
Supplemental Security Income (SSI)	<input type="checkbox"/>
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Temporary Assistance for Needy Families (TANF)	<input checked="" type="checkbox"/> Amount 714.00 ⓘ
General Assistance (GA)	<input type="checkbox"/>
Alimony and Other Spousal Support	<input type="checkbox"/>
Child Support	<input type="checkbox"/>
Other Cash Income	<input type="checkbox"/>
Total Cash Income for Individual	714.00

Program Exit

CASH INCOME FOR INDIVIDUAL	
Income from Any Source	Yes
Earned Income	<input type="checkbox"/>
Unemployment Insurance	<input type="checkbox"/>
Worker's Compensation	<input type="checkbox"/>
Private Disability Insurance	<input type="checkbox"/>
VA Service-Connected Disability Compensation	<input type="checkbox"/>
Social Security Disability Insurance (SSDI)	<input type="checkbox"/>
Supplemental Security Income (SSI)	<input type="checkbox"/>
Retirement Income from Social Security	<input type="checkbox"/>
VA Non-Service Connected Disability Pension	<input type="checkbox"/>
Pension or Retirement Income from a Former Job	<input type="checkbox"/>
Temporary Assistance for Needy Families (TANF)	<input type="checkbox"/>
General Assistance (GA)	<input type="checkbox"/>
Alimony and Other Spousal Support	<input type="checkbox"/>
Child Support	<input type="checkbox"/>
Other Cash Income	<input type="checkbox"/>
Total Cash Income for Individual	0.00

DATA QUALITY REPORTS

The following reports, found in the **Report Library** are recommended tools to use when trying to confirm data quality and accuracy.



HUD 2020 DATA STANDARDS



DATA STANDARDS ARE LIVE!

Reminders:

- 👉 **Disabling Condition** (yes/no): Only appears on the enrollment screen.
- 👉 **Move-in date:** Only appears on enrollment screen. To record a move-in date, open the program enrollment and enter the move-in date on the enrollment screen.
- 👉 **Current Living Situation Assessments:** Replaces Outreach Contact services for Night-by-Night shelters, Street Outreach, and Services Only projects
- 👉 **New SSVF Services:** Extended Shallow Subsidy, Returning Home, Rapid Resolution, and Extended Shallow Subsidy - rental assistance (financial assistance service)
- 👉 **RHY Programs:** New “Other” option and textbox for sexual orientation field
- 👉 **VA Programs:** Required to collect employment status on enrollment and exit screens.
Required to enter VAMC station number on enrollment screen.

CONTINUOUS DATA QUALITY IMPROVEMENT (CDQI)



PROFILE SCREEN DATA QUALITY REVIEW

Data Elements on the Profile Screen are a part of a group of **Universal Data Elements (UDE)** that are required to be collected when a record is made in HMIS.

Universal Data Elements that appear on the profile screen:

- Client Name
- DOB
- Ethnicity
- Gender
- Race
- SSN
- Veteran Status

ABOUT THE DATA QUALITY UDE REPORT

This report is designed to show data collection issues on the profile screen:

- ❑ Data elements recorded as: Client Doesn't Know, Client Refused, and Data not Collected.
- ❑ SSN errors will also include "Possibly Invalid" (all 0s collected and full SSN reported in quality field) and "Too Short" when the SSN reported is not 9 digits
- ❑ "Null" indicates that no response was recorded on the Profile Screen for that data element
- ❑ "**None**" indicates that there is no error with the data collection


ABOUT THE DATA QUALITY UDE REPORT

Client Name, DOB, and SSN errors are responding to the quality fields on the profile screen.

Marga Rita
PROFILE HISTORY SERVICES PROGRAMS FILES NOTES ASSESSMENTS CONTACT LOCATION REFERRALS

CLIENT PROFILE

Social Security Number	345 - 34 - 2123
Quality of SSN	Client doesn't know
Last Name	Rita
First Name	Marga
Quality of Name	Client refused
Quality of DOB	Approximate or partial DOB reported
Date of Birth	01/02/1985
Adult. Age:	34



UNIQUE IDENTIFIER
DF35775B6

RUN THE DATA QUALITY UDES REPORT

The screenshot displays the CLARITY HUMAN SERVICE system interface. The top navigation bar includes the 'System' label, a 'REPORT LIBRARY EXPLORE' menu, and a 'DATA ANALYSIS' link highlighted with a red box and the number 3. A user profile for 'Janel Fletcher, System' is visible in the top right. A search bar and 'CASELOAD' link are also present. A central menu overlay is shown, with the 'REPORTS' option highlighted by a red box and the number 2. The 'REPORTS' menu is also indicated by a red box and the number 1. The main content area shows a list of reports under the heading 'Built In Reports'. The first report is 'Santa Clara County HMIS Reports', which is expanded to show a list of reports. The 'Data Quality UDEs' report is highlighted with a red box and the number 4, and a 'RUN' button is visible next to it.

System

REPORT LIBRARY EXPLORE DATA ANALYSIS

DATA ANALYSIS

Built In Reports

Santa Clara County HMIS Reports

root

HDAP Updated Look with added filters

Data Quality UDEs

CLARITY HUMAN SERVICE

Janel Fletcher, System

SEARCH CASELOAD












SETUP MANAGE REPORTS CALENDAR

ATTENDANCE MERGE DATA IMPORT

RUN

RUN







RUN THE DATA QUALITY UDES REPORT

Data Quality UDEs										Save Look	Run	
+ FILTERS (3) Enrollments Reporting Period Filter is any time Agencies Agency Name is any value Enrollments Active in Project is "Yes"												
- VISUALIZATION           EDIT 												
Unique Identifier	Client Name Error	DOB Error	Ethnicity Error	Gender Error	Race Error	SSN Error	Veteran Status Error	Project Type Code	Name			
1	None	None	None	None	None	None	None	PH - Permanent Supportive Housing (disability required)				
2	None	None	None	None	None	None	None	PH - Permanent Supportive Housing (disability required)				
3	Partial name reported	None	None	None	None	Possibly Invalid	None	PH - Permanent Supportive Housing (disability required)				
4	None	None	None	None	None	Possibly Invalid	None	PH - Rapid Re-Housing				
5	None	None	None	None	None	None	None	PH - Rapid Re-Housing				
6	None	None	None	None	None	None	None	Services Only				
7	None	None	None	None	None	None	None	PH - Rapid Re-Housing				
8	None	None	None	None	None	None	None	PH - Rapid Re-Housing				
9	None	None	None	None	None	None	None	PH - Permanent Supportive Housing (disability required)				
10	None	None	None	None	None	None	None	PH - Rapid Re-Housing				
11	None	None	None	None	None	Possibly Invalid	None	PH - Permanent Supportive Housing (disability required)				
12	None	None	None	None	None	None	None	PH - Permanent Supportive Housing (disability required)				
13	None	None	None	None	None	None	None	PH - Permanent Supportive Housing (disability required)				
14	None	None	None	None	None	None	None	Street Outreach				
15	None	None	None	None	None	None	None	PH - Rapid Re-Housing				
16	None	None	None	None	None	None	None	PH - Rapid Re-Housing				
17	None	None	None	None	None	None	None	PH - Permanent Supportive Housing (disability required)				
18	None	None	None	None	None	None	None	PH - Permanent Supportive Housing (disability required)				

CUSTOMIZATION OF HMIS FEATURES & ENHANCEMENTS



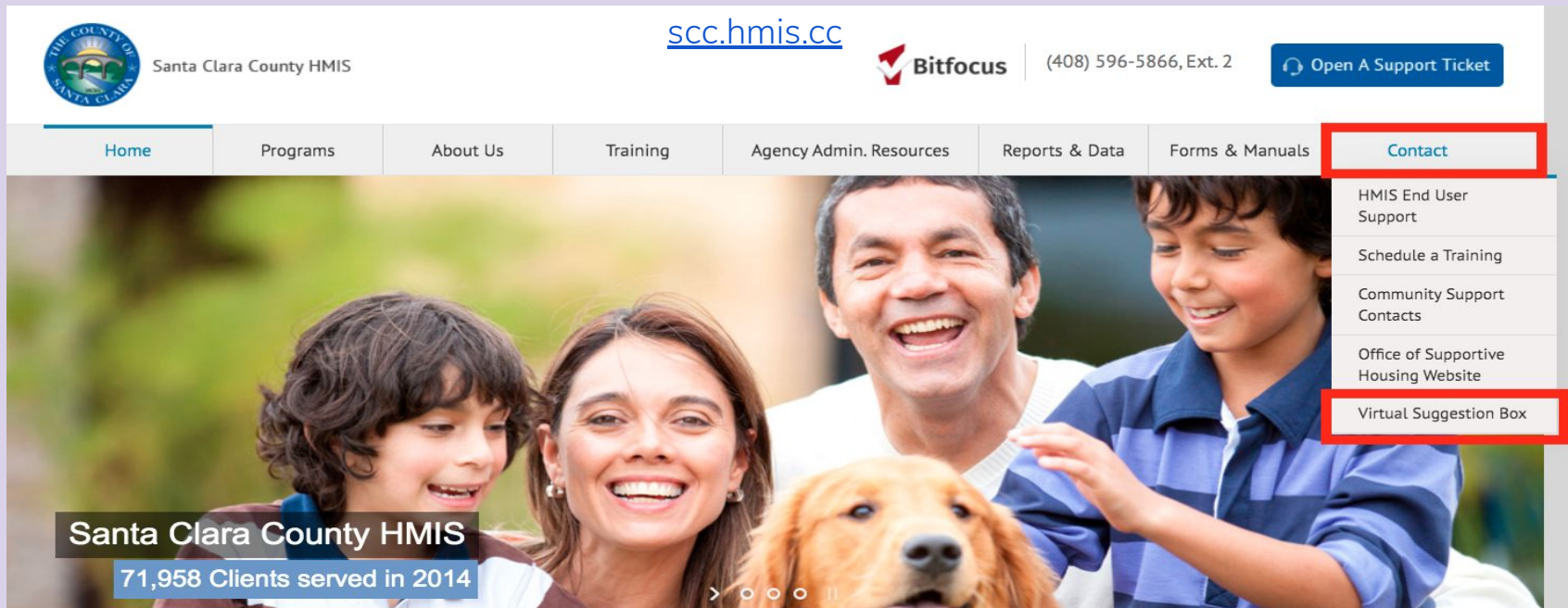
FEATURE ENHANCEMENT REQUEST LIST

-  CAWG 9/12/19: Staff contact information in HMIS
-  CAWG 9/12/19: Notification of alert for the person who touched the client last
-  Outreach Meeting 9/27/19: ISP case management functionality
-  Outreach Meeting 9/27/19: Automated refer to queue button
-  Outreach Meeting 9/27/19: Alerts for incongruent changes
-  CCP Meeting 9/30/19: Looker dimension to compare the change in income category b/t entry/status/exit

SCC VIRTUAL SUGGESTION BOX

Have ideas about an enhancement and/or addition to HMIS? Let us know! Drop it in the box!

[Virtual Suggestion Box](#)



The screenshot displays the Santa Clara County HMIS website. The header includes the county logo, the URL scc.hmis.cc, the Bitfocus logo, the phone number (408) 596-5866, Ext. 2, and a button to "Open A Support Ticket". The navigation menu contains links for Home, Programs, About Us, Training, Agency Admin. Resources, Reports & Data, Forms & Manuals, and Contact. The Contact menu is open, showing options like HMIS End User Support, Schedule a Training, Community Support Contacts, Office of Supportive Housing Website, and the Virtual Suggestion Box, which is highlighted with a red box. A large banner image of a family with a dog is featured below the menu, with text indicating "Santa Clara County HMIS" and "71,958 Clients served in 2014".

Santa Clara County HMIS
71,958 Clients served in 2014

Contact

- HMIS End User Support
- Schedule a Training
- Community Support Contacts
- Office of Supportive Housing Website
- Virtual Suggestion Box**

REMINDERS



2020 DATA STANDARDS FOR END USERS

A promotional banner for Bitfocus Training. The background is a dark, blurred image of hands holding a small object. The banner has a red border. In the top left corner, the Bitfocus Training logo is displayed. A red notification bar at the top center contains the text "Please register to access 2020 Data Standards for End Users." with a close button (X) on the right. The Bitfocus logo is centered on the left. To the right, the title "2020 Data Standards for End Users" is written in white, followed by a description: "Walk with Sarah Dougherty Director of System Administration as she explores the 2020 HUD Data Standards through the lens of an end user". A white button with the text "REGISTER | FREE" is located in the bottom right corner.

Bitfocus Training

Please register to access 2020 Data Standards for End Users. X

 **Bitfocus**

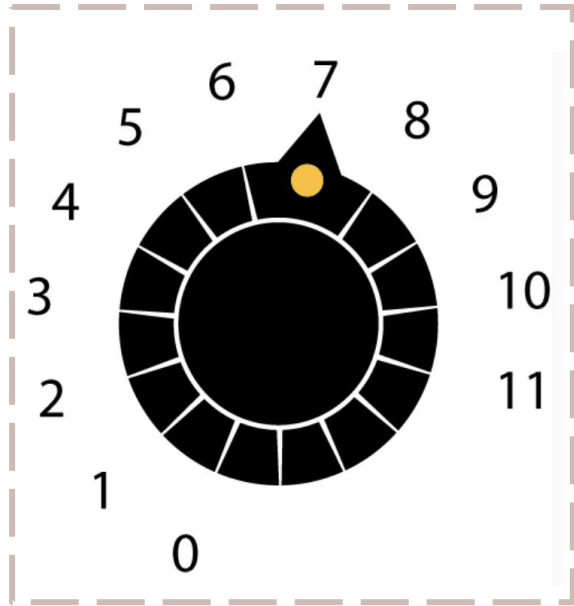
2020 Data Standards for End Users

Walk with Sarah Dougherty Director of System Administration as she explores the 2020 HUD Data Standards through the lens of an end user

REGISTER | FREE

[REGISTER HERE!](#)

AGENCY ADMIN. MEETING REQUIREMENT



Must participate in **7** in-person meetings (Zoom does not count)



If you cannot make it, please send a representative (who uses HMIS)




Countdown began with the meeting in September

UPCOMING: DATA ENGAGEMENT WORKSHOP (DEW)

Currently all booked,
but please check the
week of, for folks that
may have cancelled.

[Click here for direct link!](#)



OCT
17

Data Done Right: Data Accuracy vs. Data Quality

by Santa Clara County Continuum of Care

[Follow](#)

Free

[Register](#)

Ever wondered what's the difference between Data Accuracy and Data Quality? How it matters and it's impact on your data? If so join us!

About this Event

We hope you will join us for this upcoming **Data Engagement Workshop** (formally known as the Data Literacy Institute Workshop) to discuss data accuracy and data quality through open discussion and interactive breakout groups.

If you have any questions regarding this event please send email to leslys@bitfocus.com

Date And Time
Thu, October 17, 2019
1:00 PM – 3:00 PM PDT
[Add to Calendar](#)

Location
Excite Credit Union Community Room
(formerly Alliance CU - next to iJava)
3315 Almaden Expressway
Ste 55
San Jose, CA 95118
[View Map](#)

VI-SPDAT IMPACT ON HMIS ACCESS



Staff who miss the 60-day threshold after being granted access to HMIS will receive a courtesy email (OSH|Agency Lead| End User) from Bitfocus



Staff will have 72 hours to register for an upcoming training and must show verification of sign-up to prevent account deactivation



Staff who do not show up to a training will have account disabled



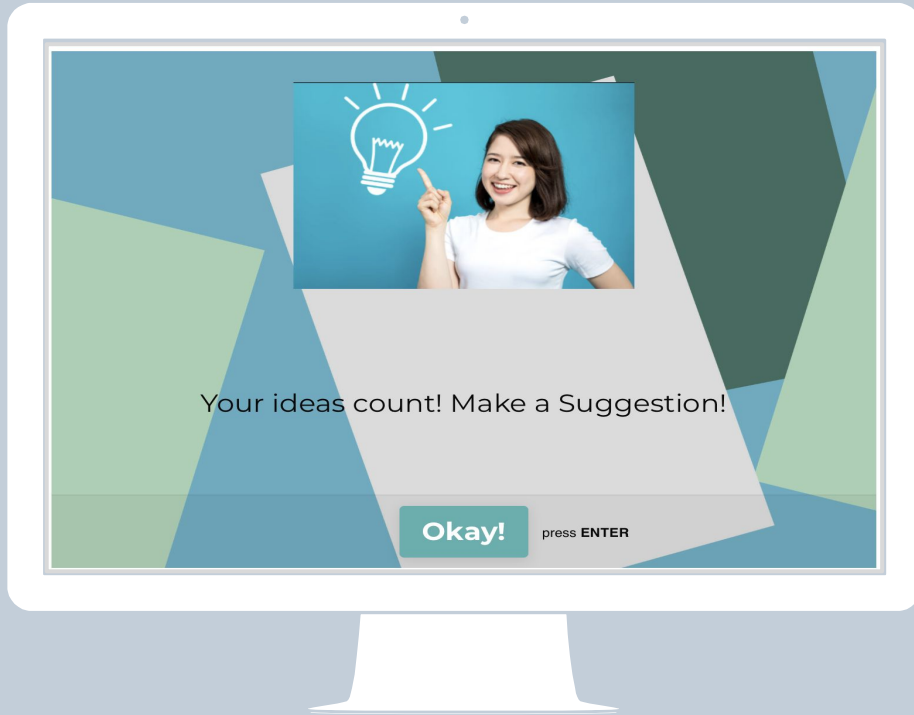
Please ensure staff are using a **work related email address**

AGENCY ADMIN. STRUCTURE SURVEY



**YOUR FEEDBACK IS
IMPORTANT TO US**

Survey will be sent out on Thursday, October 10th



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](#)



Any questions?

You can find us @

sccsupport@Bitfocus.com &

Alisonw@Bitfocus.com &

Janelf@Bitfocus.com &

Leslys@Bitfocus.com



*Thank You
For Your Time!*