

Agency Administrators Meeting

November 2, 2017





Agenda

1. CoC / Coordinated Assessment / UPLIFT Updates
2. AHAR Submission Update
3. Clarity Human Services Feature Update
4. Looker / Reporting Updates and Feedback
5. User Survey is Coming
6. HomeFirst's Continuous Quality Improvement Forum
7. CDQI
8. Inclement Weather

CoC/ Coordinated Assessment/ UPLIFT Updates



Other Announcements

- CCP Workflow Training next Monday, 11/6
- Document translation: Spanish and Vietnamese versions of VI-SPDAT, ROI, and HMIS Intake recently translated - forms will be posted on <http://scc.hmis.cc/client-forms/> and an email will go out once they are available



AHAR Submission Update





AHAR Submission Update

First Draft Submitted on 10/27

Next steps:

- AHAR Liaison will review the data and send questions
- If needed, Bitfocus will make adjustments and send out any clarifying questions to agencies
- Final submission due 12/1

Thank you for all of your help with AHAR!



Clarity Human Services Feature Update





New Look and Feel

The user interface for Clarity Human Services HMIS changed in late October

Data entry workflow and navigation is largely unchanged, but icons/buttons/visuals have been streamlined

Login Screen

New login screen



CLARITY
HUMAN SERVICES

Username



Password



SIGN IN

[FORGOT PASSWORD?](#)

**New section
for system-
wide notices**

Important Notice!

Welcome to the Clarity Human Services Development environment. This site contains non-production development, and should not be considered stable.



If you have any questions, please contact the system administrator for further assistance.




Search Page




Out of the Rain

New icons, no more tabs



Sarah Dougherty,
Out of the Rain ▾



 SEARCH  CASELOAD  REFERRALS

SEARCH FOR A CLIENT

New Add Client icon

SEARCH

ADD CLIENT 

Your recent client searches accessed:

Cookie Calendar

Jenny Alvarez

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Profile Page

Jenny Alvarez

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES SERVICES LOCATION REFERRALS

4

Sarah Dougherty,
Out of the Rain

SD

SEARCH

CASELOAD

CLIENT PROFILE

Social Security Number

XXX - XX - 1341

Quality of SSN

Full SSN Reported

Last Name

Alvarez

First Name

Jenny

Quality of Name

Full name reported

Quality of DOB

Full DOB Reported

Date of Birth

01/01/1977

Adult. Age: 40

UNIQUE IDENTIFIER
69442491E

ID under photo

Icons moved up

Household Members

Manage

No active members

Active Programs

Test Housing

Assigned Staff 1



Programs Page

Jenny Alvarez

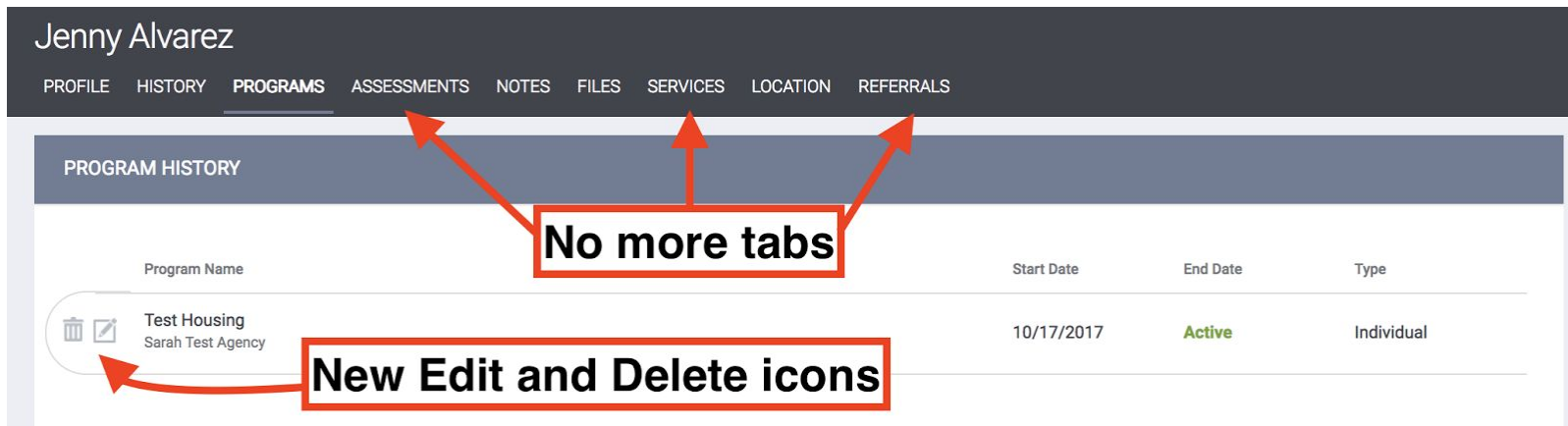
PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES SERVICES LOCATION REFERRALS

PROGRAM HISTORY

No more tabs

Program Name	Start Date	End Date	Type
  Test Housing Sarah Test Agency	10/17/2017	Active	Individual

New Edit and Delete icons



The screenshot displays the 'Programs Page' for a user named Jenny Alvarez. At the top, there is a dark navigation bar with the user's name and a series of tabs: PROFILE, HISTORY, PROGRAMS (which is the active tab), ASSESSMENTS, NOTES, FILES, SERVICES, LOCATION, and REFERRALS. Below this bar, the main content area is titled 'PROGRAM HISTORY'. A table lists the program history. The first row shows a program named 'Test Housing' by 'Sarah Test Agency'. To the left of the program name are two icons: a trash can (delete) and a pencil (edit). The table also includes columns for 'Start Date' (10/17/2017), 'End Date' (Active), and 'Type' (Individual). Two red annotations are present: a box labeled 'No more tabs' with three arrows pointing to the ASSESSMENTS, SERVICES, and REFERRALS tabs; and a box labeled 'New Edit and Delete icons' with an arrow pointing to the delete and edit icons in the first row of the table.

Data Entry Forms

682D073B9 Refused

PROFILE HISTORY **PROGRAMS** SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

LIVING SITUATION

Type of Residence

**New drop-down
menu style**

Place not meant for habitation



Length of Stay in Prior Living Situation

Select



Approximate Date Homelessness Started

New date icons

__/__/__ 25



Number of times on the streets, in ES, or Safe Haven in the past three years

Select



Total number of months homeless on the streets, in ES, or Safe Haven in the past three years

Select





Data Entry Forms

WHAT TYPE OF HEALTH INSURANCE DO YOU HAVE, IF ANY?

MEDICAID



MEDICARE



VA Medical



Private Insurance



No Health Insurance



Other



**Toggles instead
of checkboxes**





Two Factor Authentication (2FA)

Clarity Human Services now supports Two Factor Authentication (2FA)

2FA allows for enhanced security system-wide to reduce risk of unauthorized user access

2FA would require all users to use either a 2FA Authenticator App (which would need to be downloaded onto a mobile device) or Email code to access HMIS

OSH and Bitfocus are seeking feedback before activating 2FA for all HMIS users

First Time Logging in with 2FA

When you log in to HMIS, you will be asked whether you want to use an Authenticator App or get emailed a code



CLARITY
HUMAN SERVICES

Set Up Two-factor Authentication

How would you like to verify your account?

☒ Use an Authenticator App (**Most Secure**).

The next page will provide full instructions.

☐ Get a code emailed to:

*****@bitfocus.com

NEXT



Option 1: Using the Authenticator App

If the Authenticator App option is chosen, users will follow the instructions on the screen:

1. Download the Authenticator App onto their mobile device
2. Use their device to scan the code on the screen
3. The app will show a 6-digit code that the user will type into HMIS
4. Clicking the “Trusted Device” button means that you won’t need to enter another code for 30 days



CLARITY
HUMAN SERVICES

Set Up Two-Factor Authentication

Download an Authenticator App

Android, iOS and Blackberry — **Google Authenticator**

Windows Phone — **Microsoft Authenticator**

Scan this code with the app



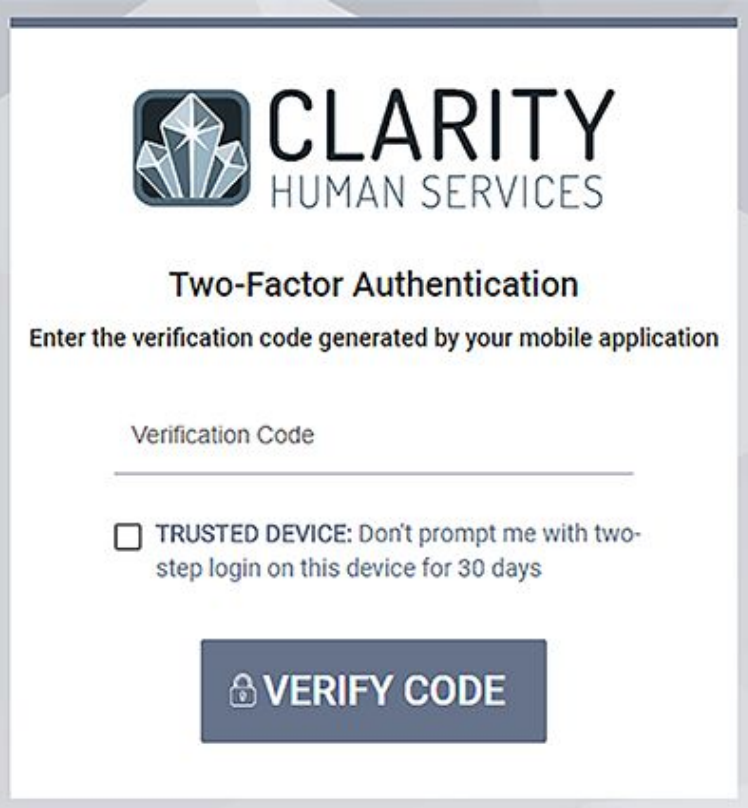
Enter the 6-digit code generated by the app

VERIFY CODE

☐ **TRUSTED DEVICE:** Don't prompt me with two-step login on this device for 30 days

Option 1: Using the Authenticator App

The next time you need login in and need to complete 2FA, the screen will ask for the 6-digit code, which users can find by opening the Authenticator App on their mobile device



The screenshot shows a login screen for Clarity Human Services. At the top, there is a logo consisting of a blue square with white geometric shapes, followed by the text "CLARITY" in large, bold, black letters and "HUMAN SERVICES" in smaller, grey letters below it. Below the logo, the text "Two-Factor Authentication" is displayed in bold. Underneath, it says "Enter the verification code generated by your mobile application". There is a label "Verification Code" followed by a horizontal input line. Below this, there is a checkbox labeled "TRUSTED DEVICE: Don't prompt me with two-step login on this device for 30 days". At the bottom, there is a dark blue button with a white padlock icon and the text "VERIFY CODE".


CLARITY
HUMAN SERVICES

Two-Factor Authentication

Enter the verification code generated by your mobile application

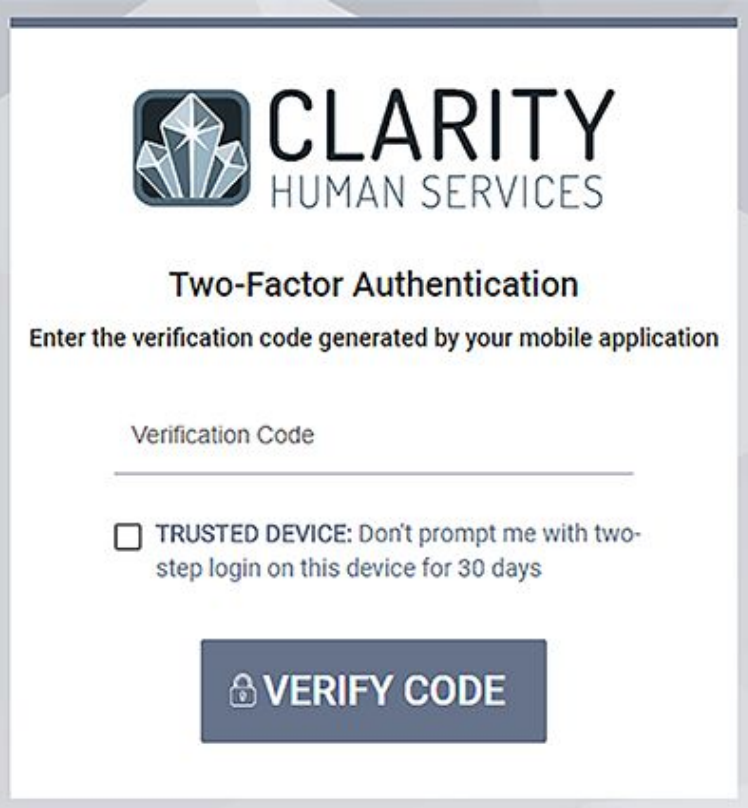
Verification Code

☐ **TRUSTED DEVICE:** Don't prompt me with two-step login on this device for 30 days


 **VERIFY CODE**

Option 1: Using the Authenticator App

The next time you need login in and need to complete 2FA, the screen will ask for the 6-digit code, which users can find by opening the Authenticator App on their mobile device



The screenshot shows a login screen for Clarity Human Services. At the top, there is a logo consisting of a blue square with white geometric shapes, followed by the text "CLARITY" in large, bold, black letters and "HUMAN SERVICES" in smaller, grey letters below it. Below the logo, the text "Two-Factor Authentication" is displayed in bold. Underneath, a prompt says "Enter the verification code generated by your mobile application". There is a text input field labeled "Verification Code" with a horizontal line below it. Below the input field, there is a checkbox labeled "TRUSTED DEVICE: Don't prompt me with two-step login on this device for 30 days". At the bottom, there is a large blue button with a white padlock icon and the text "VERIFY CODE".


 **CLARITY**
HUMAN SERVICES

Two-Factor Authentication

Enter the verification code generated by your mobile application

Verification Code

☐ **TRUSTED DEVICE:** Don't prompt me with two-step login on this device for 30 days

 **VERIFY CODE**



Option 2: Using Email

If the Email option is chosen, users be emailed a verification code that they will need to enter into HMIS in order to login in



CLARITY
HUMAN SERVICES

Set Up Two-factor Authentication

How would you like to verify your account?

☒ Use an Authenticator App (**Most Secure**).
The next page will provide full instructions.

☐ Get a code emailed to:
*****@bitfocus.com

NEXT



Looker / Reporting Updates and Feedback





New Versions of HUD-Required Reports

New versions of the following are available in the Reports Library (HUD Reports folder):

- [HUDX-227] Annual Performance Report [Oct 2017]
- [HUDX-228] ESG CAPER [Oct 2017]
- [HUDX-225] HMIS Data Quality Report

The “Oct 2017” version of the APR is now required for Sage APR submissions. ***The process of running the report and submitting it in Sage has not changed.***

The ESG CAPER must be submitted through Sage instead of eCart.

The older versions of the APR and CAPER are still available, but will be deactivated soon.

HUD Reports

10 report(s) ^

[HUDX-111] HUD CSV / XML Program Data Export	▶ RUN
[HUDX-221] ESG CAPER [2016]	▶ RUN 📅 SCHEDULE
[HUDX-202] Program Based Annual Homeless Assessment Report [AHAR]	▶ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-104] Service Based Annual Homeless Assessment Report V4 [AHAR]	▶ RUN 📅 SCHEDULE MORE INFO ▾
[HUDX-106] HUD Veteran By-Name List	BETA ▶ RUN 📅 SCHEDULE
[HUDX-224] PATH Annual Report [Apr 2017]	▶ RUN 📅 SCHEDULE
[HUDX-225] HMIS Data Quality Report	▶ RUN 📅 SCHEDULE
[HUDX-226] Annual Performance Report [Apr 2017]	▶ RUN 📅 SCHEDULE
[HUDX-228] ESG CAPER [Oct 2017]	▶ RUN 📅 SCHEDULE
[HUDX-227] Annual Performance Report [Oct 2017]	▶ RUN 📅 SCHEDULE



Regular Looker Trainings Now Available

Bitfocus is providing monthly webinars for Agency Managers on how to use the Data Analysis and Explore tabs in the Report Library (Looker)

Webinar registration is available on the SCC HMIS website, under Trainings -> Schedule a Training:

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

Each training takes place over 2 sessions

Register for Looker/Clarity Data Analysis Training

Data Analysis training is limited to users with a Clarity Human Services Agency Manager license. An overview of how the data is structured in Looker and how to use the Clarity > Looker interface will be reviewed. The complete training takes place over two 2-hour sessions.

<p>Oct 31 & Nov 2, 1pm-3pm</p> <p>CLICK HERE TO REGISTER</p>	<p>Nov 13 & Nov 15, 10am-12pm</p> <p>CLICK HERE TO REGISTER</p>
<p>Nov 29 & Dec 1, 1pm-3pm</p> <p>CLICK HERE TO REGISTER</p>	<p>Dec 12 & Dec 14, 10am-12pm</p> <p>CLICK HERE TO REGISTER</p>



Feedback Needed: User-Level Reports Training

Would it be helpful to have a reports webinar for all HMIS users?

The webinar would highlight reports in the Report Library in HMIS that may be useful to Case Managers, Intake staff, and other HMIS users



User Survey Coming



User Survey is Coming

Bitfocus is working on a User Survey about HMIS and Bitfocus services

Survey will be sent out to all HMIS users

Results will be compiled and shared with Agency Administrators



HomeFirst's Continuous Quality Improvement Forum





CDQI



CDQI: Continuous Data Quality Improvement

Last few months: focused on AHAR data quality completeness

This month:

- Start reviewing Housing Inventory Count information
- Focus on Housing Move-In Date for RRH, PSH, and PH programs



Housing Inventory Count (HIC)

The Housing Inventory Count (HIC) is conducted annually in late January

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)

Feedback on Last Year's HIC Preparation

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



HIC Review This Month

- Let us know if any new housing or shelter programs have come online during calendar year 2017 or will be starting by end of December
- Let us know if any programs have stopped operating during calendar 2017 or are closing in the next few months
- If you don't have the information handy, start researching the following for your programs:
 - Federal funding sources
 - Address (for shelter sites or PH programs with dedicated units) or Zip Code where the majority of units are located (for tenant-based programs)
 - Geocode
 - Housing Type (Site based single site, Site based cluster/multiple site, Tenant-based scattered site)
- Bitfocus will send information to review related to program set-up and address information



HIC and Housing Move-In Date

Will be used to:

- Determine bed/unit capacity on the HIC for Rapid Re-Housing programs
- Will be used to determine number of clients counted for the Utilization rate for Rapid Re-Housing and Permanent Supportive Housing programs

Please make sure that your RRH and PSH clients have a Housing Move-In Date entered if they are housed



Looker Report: Housing Move-In Date Review

Where to find it:

- Reports Library, Data Analysis tab
- Available to Agency Managers

Important Notes:

- Shows Housing Move-In Date for households in a given reporting range

REPORT LIBRARY EXPLORE DATA ANALYSIS	
Built In Reports 0 report(s) ▾	
Santa Clara County HMIS Reports 8 report(s) ▴	
root	
CCP Reports	
Coordinated Assessment	
Data Analysis Tab	
UPLIFT Percent Allocated by Agency (Apr-Jun Allocations) rev 4-28-17	▶ RUN
UPLIFT Clients with More than One Badge or Sticker revised 6/12/17	▶ RUN
Data Quality Report revised 5-31-2017	▶ RUN
UPLIFT Percent Allocated by Agency (Jul-Aug 2017 Allocations) rev 6-15-17	▶ RUN
Housing Placement Report rev 9-20-17	▶ RUN
UPLIFT Percent Allocated by Agency (Oct-Dec 2017 Allocations) rev 9-13-17	▶ RUN
_draft Clients with Expiring ROIs 21Sept17	▶ RUN
Housing Move-In Date Review (RRH, PSH, PH programs) rev 11-1-17	▶ RUN



Report Filters

Housing Move-In Date Review (RRH, PSH, PH programs) rev 11-1-17

Save Look

0 rows · from cache · 28m ago

Run



FILTERS

Custom Filter

Enrollments Reporting Period Filter <small>Conditionally Required</small>	is in range	:	2017-10-01	until (before)	2017-11-01	+
Agencies Agency Name	is equal to	:	System	×	+	
Enrollments Head of Household (Yes / No)	is	:	Yes	:	×	
Programs Name	is equal to	:	Test	×	+	
Programs Project Type Code	is equal to	:	PH - Housing Only PH - Housing with Services (no disability ... PH - Permanent Supportive Housing (dis... PH - Rapid Re-Housing	×	+	

Update date range, Agency Name, and Program Name

VISUALIZATION

DATA

RESULTS

Calculations

Row Limit 500

Totals

Agencies Agency Name	Programs Name	Clients Unique Identifier	Enrollments Project Start Date	Enrollments Project Exit Date	Entry Screen Housing Move-In Date	Update/Exit Screen Housing Move-In Date	Housing Move-In Date
-----------------------------	----------------------	----------------------------------	---------------------------------------	--------------------------------------	------------------------------------------	------------------------------------------------	----------------------



Inclement Weather





Inclement Weather

For agencies running Inclement Weather Programs this winter season, HMIS can be used to track and report on clients served by those programs

Tracking data in Clarity is optional - as in past years, agencies will need to submit their Inclement Weather numbers to OSH (Michelle Covert)

If your agency is interested in tracking Inclement Weather Programs using HMIS, please contact Bitfocus. Bitfocus will automatically set up the same Inclement Weather Programs that used HMIS last year.