



# System Overview: Tips and Tools for Navigating HMIS May 7, 2024

# Today's Training Team



Angie Evans  
Bitfocus



Lesly Soto Bright  
Bitfocus



Leila Qureishi  
County: OSH



Marcell Leath  
San Jose



Nate Montgomery  
San Jose

# Overview - What Today's Training Will Cover

10:00am – 10:15am: Introductions (Lesly)

10:15am – 10:25am: Clarity System Overview (Angie)

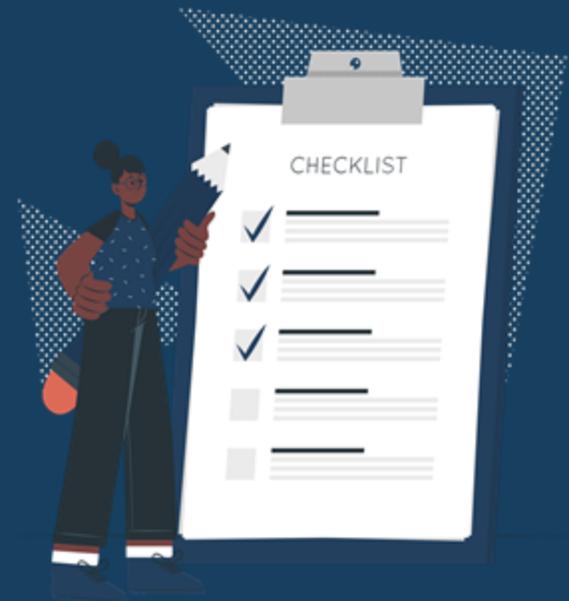
10:25am – 10:40am: Managing the Client Record (Lesly)

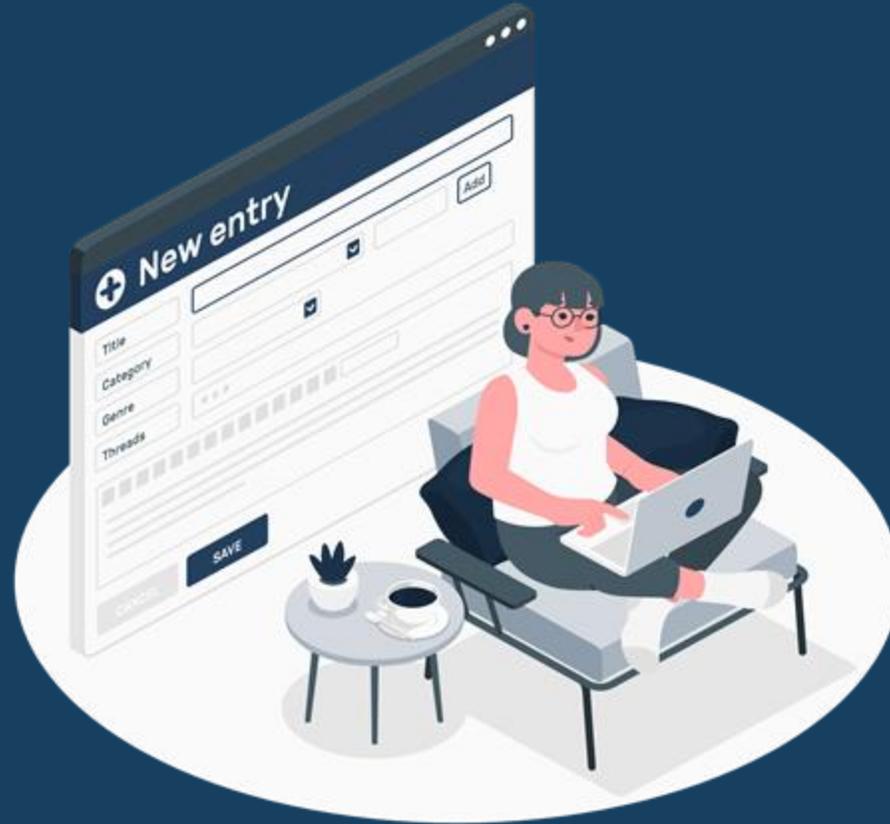
10:40am – 10:55am: Reporting (Angie)

10:55am – 11:00am: Zoom Room Assignments

11:00am – 11:30am: Scenarios/Practicum

11:30am – 12:00pm: Debrief





# Clarity System: Overview

# Clarity System: Overview



**Login To HMIS**

Login to the Santa Clara County  
Clarity Human Services HMIS here.



# Case Management

The screenshot displays a user interface for a case management system. At the top, the case name 'Luke Skywalker Test' is shown, along with navigation tabs: PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. The user 'Angie Evans, HomeFirst' is logged in, with a search bar and 'CASELOAD' button. The main content area is titled 'PROGRAM: SER CSJ - STREET OUTREACH' and features a sub-menu with 'Enrollment', 'History', 'Provide Services', 'Assessments', 'Notes', and 'Files'. The 'Provide Services' tab is active, showing a list of services: Behavioral Health Connection (Health Care), Housing Problem Solving Attempted (Case Management), Outreach (No Category), and RRH (SER/RRH CSJ) (Case Management). The RRH section is expanded to show 'Clinical Services', 'Housing inspection', 'Housing Search', and 'Mobile Case management'. On the right sidebar, a green banner indicates '39 DAYS ACTIVE PROGRAM'. Below this, a table lists program details: Program Type (Group (2)), Program Start Date (03/22/2024), Assigned Staff (Lesly Soto Bright), and Head of Household (Luke Skywalker Test). The 'Program Group Members' section lists 'Clara Test (She/Her/Hers)' with a start date of 03/28/2024 and an 'Active' status. The 'Status Assessments' section shows an assessment due on 04/09/2024 with a 'STATUS' button and a notification setting of 'ON'. A 'Chat Widget' icon is visible in the bottom right corner.

**Case Management Interface**

**Case Name:** Luke Skywalker Test

**Navigation:** PROFILE, HISTORY, PROGRAMS, SERVICES, ASSEMENTS, NOTES, FILES, CONTACT, LOCATION

**User:** Angie Evans, HomeFirst

**Program:** SER CSJ - STREET OUTREACH

**Sub-menu:** Enrollment, History, Provide Services, Assessments, Notes, Files

**Services:**

- Behavioral Health Connection (Health Care)
- Housing Problem Solving Attempted (Case Management)
- Outreach (No Category)
- RRH (SER/RRH CSJ) (Case Management)
  - Clinical Services
  - Housing inspection
  - Housing Search
  - Mobile Case management

**Program Summary:**

- 39 DAYS ACTIVE PROGRAM**
- Program Type: Group (2)
- Program Start Date: 03/22/2024
- Assigned Staff: Lesly Soto Bright
- Head of Household: Luke Skywalker Test

**Program Group Members:**

- Clara Test (She/Her/Hers) | 03/28/2024 | **Active**

**Status Assessments:**

- 04/09/2024 **STATUS**
- Assessment due every year
- Notification: **ON**

**Chat Widget**

# Resource Directory

The screenshot displays the HomeFirst Resource Directory interface. At the top, the "HomeFirst" logo is visible on the left, and a notification bell icon with a red "1" is on the right. Below the header is a dark blue bar with the text "RESOURCE DIRECTORY".

The main area features a map of California with several purple location markers. The markers are labeled with letters: "R", "u", "r", "T", "C", "W", "6", "E", "G", "I", "Z", "U", "P", "L", "h", "W", "h". The map includes labels for cities like Livermore, Modesto, Turlock, Los Banos, Watsonville, and Santa Cruz, as well as "San Luis National Wildlife Refuge". On the left side of the map, there are zoom controls (+, -, and a grid icon) and a right arrow icon.

On the right side, a white navigation menu is open, listing the following options with corresponding icons:

- SETUP (gear icon)
- MANAGE (document icon)
- REPORTS (document icon)
- CALENDAR (calendar icon)
- ATTENDANCE (document icon)
- MERGE (document icon)
- DATA IMPORT (database icon)
- INVENTORY (house icon)
- MASS SENDING (phone icon)
- RESOURCE DIRECTORY (location pin icon)

At the bottom of the interface, there is a search bar with the following filters: Agency Select, Program Select, Category Select, City Select, and Status All. A "SEARCH" button is located to the right of these filters.

# Attendance Services

Help Center Agency

FOOD FOR THE KINGDOM : SACK LUNCH

Date 05/18/2018  Friday, May 18th, 2018

Manual Scanned

### In Attendance

Client Name	Last 4 SSN	
Lion, Mufasa	4589	
Lion, Scar	1111	

### Clients from last 4 Months

Client Name	Last 4 SSN
-------------	------------

### Client Search

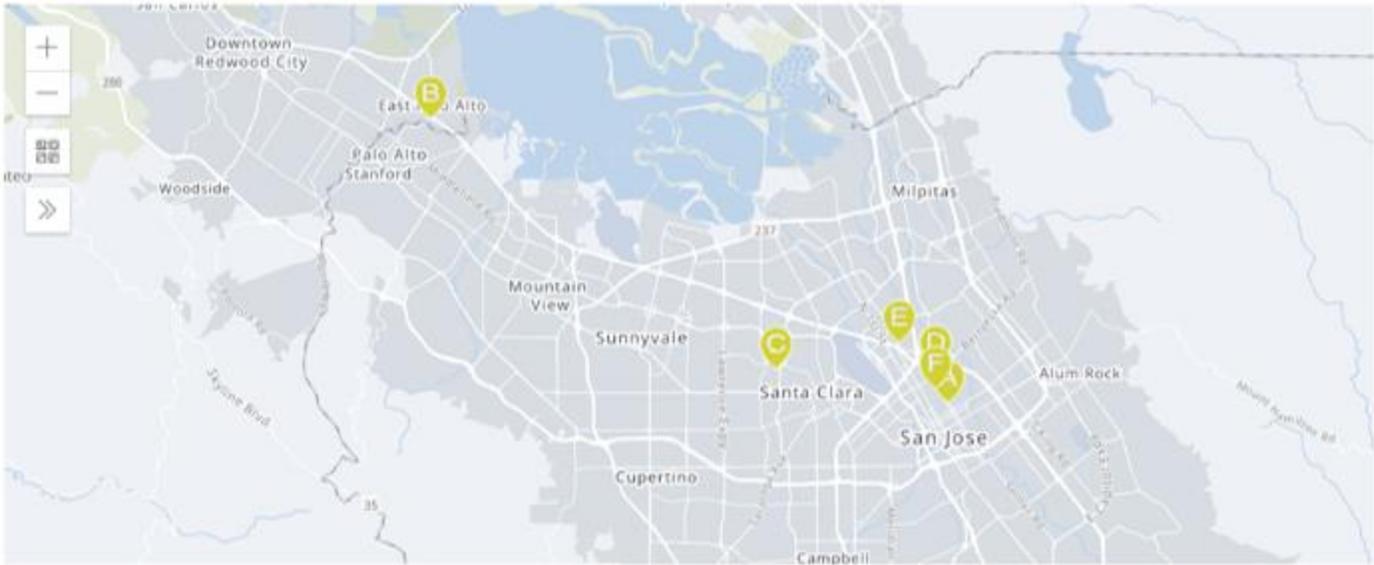
Clients Name	Date of Birth	Last SSN	
Gaglione, Michael	04/07/1996	9-13	 Add
 Lion, Mufasa (Alias: Mufasa)	12/12/1967	4589	Added
 Lion, Sarabi	04/01/1994	2545	 Add
Lion, Sarafina	12/25/1994	1345	 Add
Lion, Scar	09/08/1978	1111	Added

# Outreach & Engagement

## Luke Skywalker Test

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

CLIENT LOCATION ADD ADDRESS +



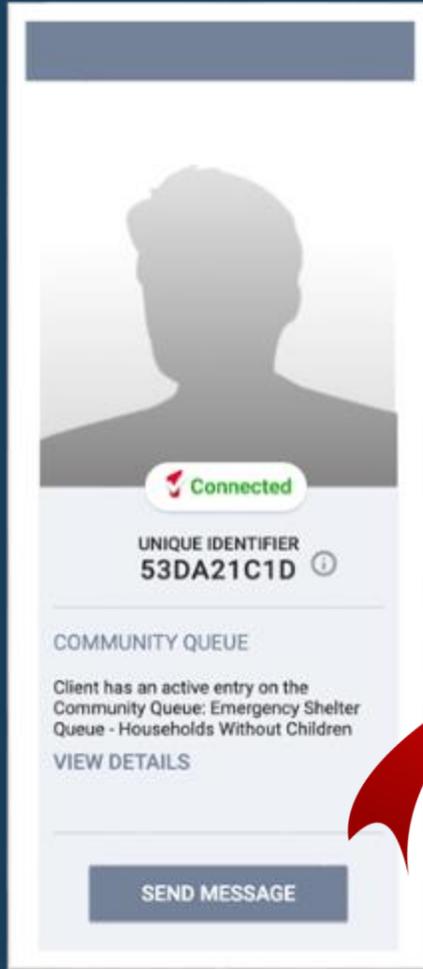
Type  Status  SEARCH

Address	Last Updated Staff	Type	Location Date
<span>A</span> 11 N 6th St, San Jose, California, 95112	Angle Evans	Address: Client Supplied	06/09/2023

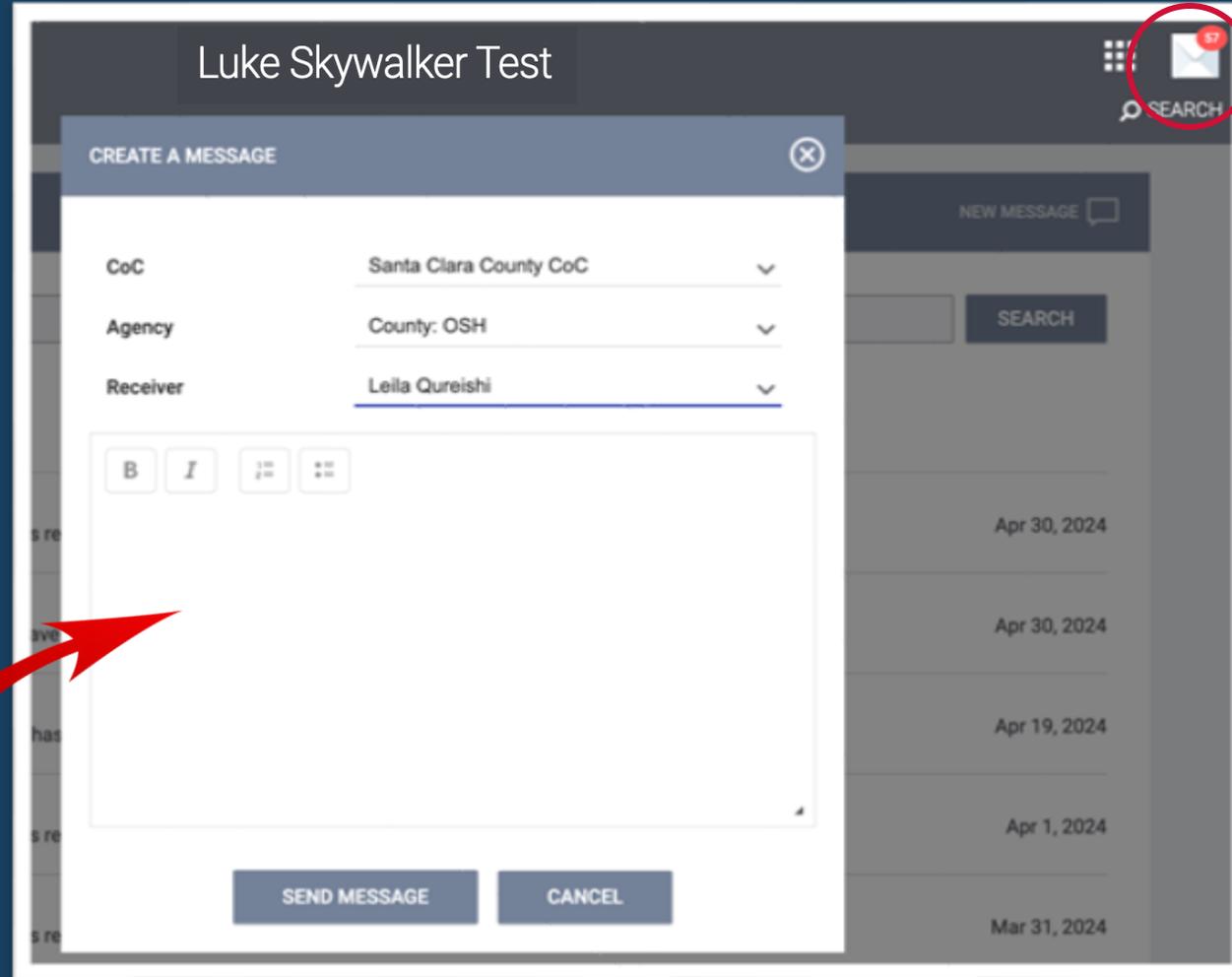
# MyConnectSV: The Clarity Portal

The screenshot displays the MyConnectSV Clarity Portal interface. At the top left is the logo for CLARITY HUMAN SERVICES. The top right corner shows a notification bell with '12' and a user profile for 'Luke' with a dropdown arrow. A dark sidebar on the left contains navigation links: Dashboard, Activity, Assessments, Calendar, Community Info, Documents, Location, Message Center, Privacy, and Resource Directory. The main content area features a large 'Welcome Luke Skywalker' header. Below this is a notification: 'You are currently on the following queue(s): Emergency Shelter Queue - Households Without Children'. A 'LOCATION' section contains a map of the San Jose area with a location pin. On the right, there are two sections: 'HOUSEHOLD' listing 'Clara Test' and 'Luke Skywalker Test', and 'CARE TEAM' listing 'Alpha Test', 'Angie Evans', 'Elisha Heruty', and 'Leclv Soto Briht'.

# Communicating with CoC Staff & Clients



Client profile card for Luke Skywalker Test. It features a silhouette of a person's head and shoulders. Below the silhouette is a green "Connected" status indicator. The unique identifier is 53DA21C1D. The community queue section indicates the client has an active entry on the Emergency Shelter Queue - Households Without Children. A "VIEW DETAILS" link is present. At the bottom is a "SEND MESSAGE" button.



Screenshot of the messaging interface for Luke Skywalker Test. A "CREATE A MESSAGE" modal is open, showing dropdown menus for CoC (Santa Clara County CoC), Agency (County: OSH), and Receiver (Leila Qureishi). The modal includes a rich text editor with bold (B), italic (I), bulleted list, and numbered list icons. The background shows a message list with dates: Apr 30, 2024, Apr 30, 2024, Apr 19, 2024, Apr 1, 2024, and Mar 31, 2024. A red circle highlights a notification icon in the top right corner of the interface. A red arrow points from the "SEND MESSAGE" button in the client profile to the "SEND MESSAGE" button in the modal.

# Coordinated Entry

REFERRALS

Dashboard
Pending
Community Queue
Analysis
Completed
Denied
Sent
Snoozed
Availability
Open Units

### Community Queue Prioritization Dashboard

just now
🔄
☰
⋮

Community Queue Name: Community Housing Queue ✕ ▾

Assessment Score: 0 25

Active ROI?: Yes No

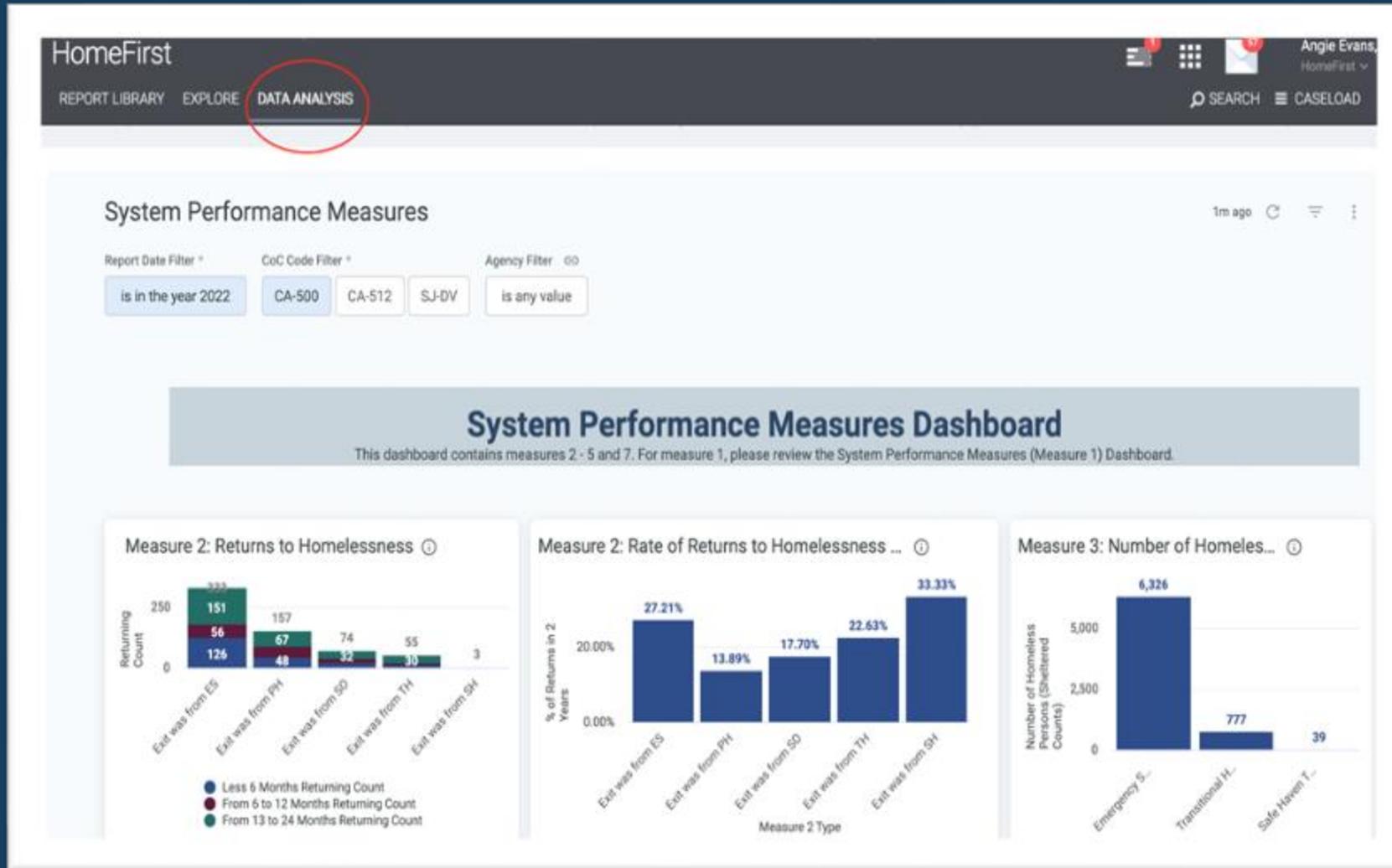
ROI Issue Identified (Yes / No): Yes No

Current Age: 1 100

Assessment Processor (2): is F-SPDAT for Families (v5.2) or JD-VI-SPDA...

	Client Full Name	Client ID	Unique Identifier	Assessment Date	Assessment Processor	Assessment Score	Sub Score Risks	How many total years have you been homeless?	Active ROI?	ROI Issue Identified (Yes / No)
1	[REDACTED]	171967...	5305769...	2023-11-14	VI-F-SPDAT Prescreen f...	21	4	3	Yes	No
2	[REDACTED]	186145...	0341AE8...	2024-03-15	VI-F-SPDAT Prescreen f...	21	4	6	Yes	No
3	[REDACTED]	29730	DA72CD...	2022-08-12	VI-F-SPDAT Prescreen f...	20	4	7	No	No
4	[REDACTED]	177013...	E863BE3...	2023-04-20	VI-F-SPDAT Prescreen f...	20	4	0	Yes	No
5	[REDACTED]	100139...	96243D2...	2023-04-25	VI-F-SPDAT Prescreen f...	20	4	12	Yes	No
6	[REDACTED]	179487...	5EF1985...	2023-06-30	VI-F-SPDAT Prescreen f...	20	4	3	Yes	No
7	[REDACTED]	181424...	093E1EC...	2024-01-25	VI-F-SPDAT Prescreen f...	20	4	15	Yes	No
8	[REDACTED]	115027...	6842797...	2024-03-15	VI-F-SPDAT Prescreen f...	20	4	6	Yes	No

# Reporting & In-Depth Data Analysis



# Reporting: Regulatory Compliance

The screenshot displays the HomeFirst REPORT LIBRARY interface. The top navigation bar includes 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. The 'REPORT LIBRARY' tab is selected and circled in red, with a sub-tab for 'Housing' also circled. Below the navigation, the 'HUD Reports' section lists several reports with their respective actions (RUN, SCHEDULE, MORE).

Report Name	Actions
[HUDX-111] HUD CSV / XML Program Data Export [FY 2024]	★   RUN   SCHEDULE   MORE
[HUDX-224] PATH Annual Report [FY 2024]	★   RUN   SCHEDULE   MORE
[HUDX-225] HMIS Data Quality Report [FY 2024]	★   RUN   SCHEDULE   MORE
[HUDX-227] Annual Performance Report [FY 2024]	★   RUN   SCHEDULE   MORE
[HUDX-228] ESG CAPER [FY 2024]	★   RUN   SCHEDULE   MORE
[HUDX-231] LSA Export - Project-Focused LSA [FY 2023]	★   RUN   SCHEDULE   MORE INFO
[HUDX-235] CE APR [FY 2024]	★   RUN   SCHEDULE   MORE INFO
[HUDX-236] LSA - Project Descriptor HDX Upload Test [FY 20...	★   RUN   SCHEDULE   MORE INFO

A navigation menu is overlaid on the right side of the screen, featuring icons for various functions. The 'REPORTS' icon is circled in red. The menu items are: SETUP, MANAGE, REPORTS, CALENDAR, ATTENDANCE, MERGE, DATA IMPORT, INVENTORY, MASS SENDING, and RESOURCE DIRECTORY.



**Bitfocus**

Clarity Human Services Help  
Center

[Go to bitfocus.com](https://bitfocus.com)

[Request Article Update](#)

# Hello. How can we help?

**Support** - HelpCenter website

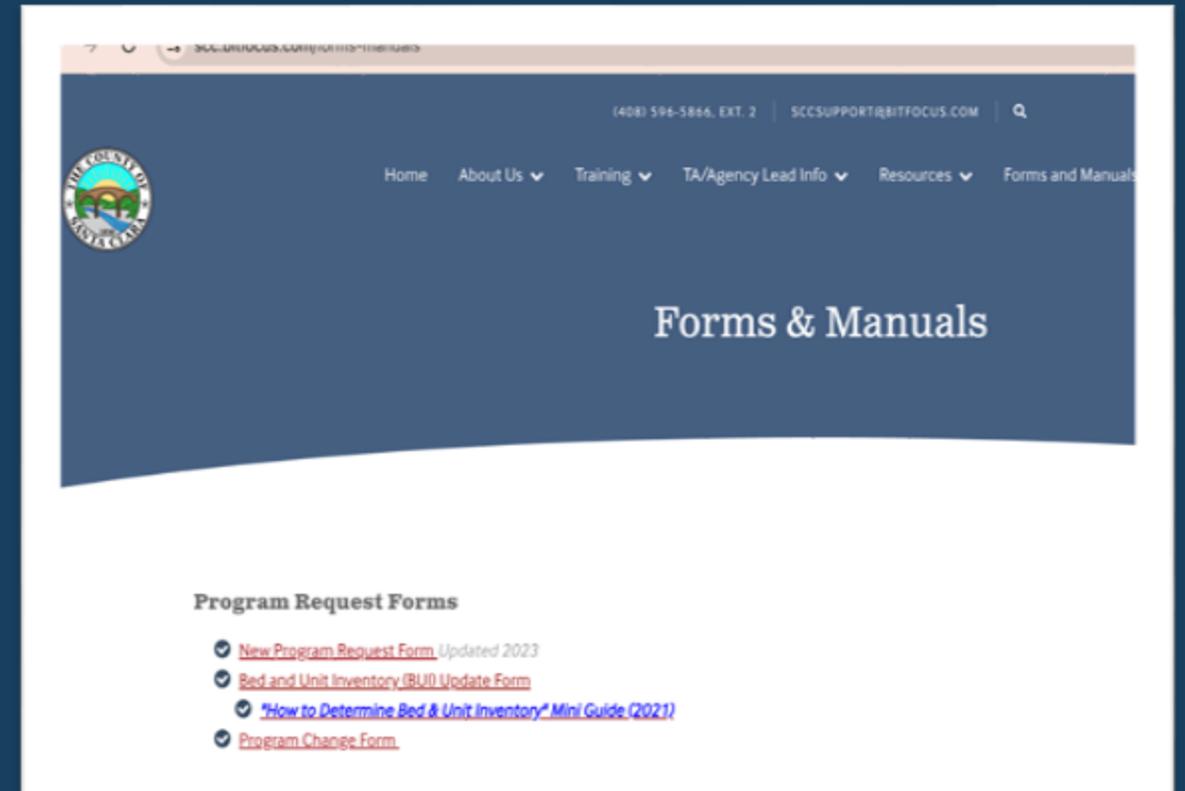
**Help Desk:** [SCCSUPPORT@BITFOCUS.COM](mailto:SCCSUPPORT@BITFOCUS.COM)

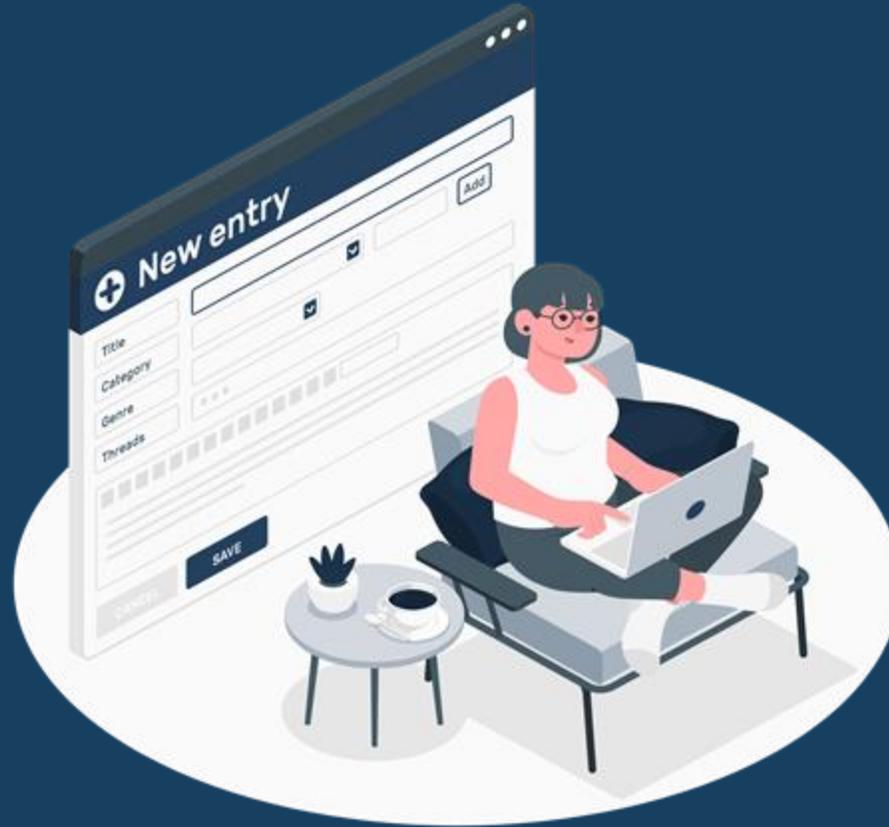
**Phone:** (408) 596-5866, EXT. 2



**Where to find** workflow documents, client forms, and get Santa Clara County HMIS questions answered:

**scc.bitfocus.com**





# Managing the Client Record

# Managing the Client Record – Searching for Clients In Clarity

## Search

- Search by name , partial name, DOB and SSN

## Create

- If unable to find, create a new profile

SEARCH FOR A CLIENT

ADD CLIENT +

**Search by name, partial name, DOB or SSN**

SEARCH

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

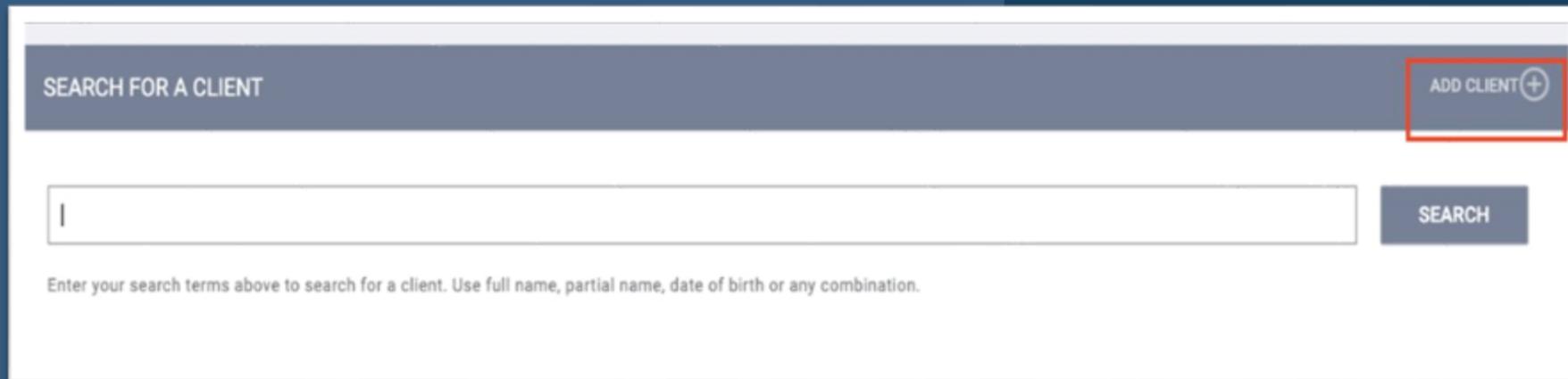
Managed with Clarity Human Services

Recover deleted data

# Managing the Client Record – Creating New Clients

Please make sure to collect as much information as possible, and avoid using "Client Prefers not to Answer" or Data Not Collected" whenever possible

For existing profiles confirm that all information is correct and up to date



SEARCH FOR A CLIENT

ADD CLIENT (+)

SEARCH

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

# Managing the Client Record – Client Consent

## Informed Consent:

- Client should understand what they are consenting to.
- Consent form (ROI) should be available for the client to review and take

## Consent Duration:

- Clients only need to consent once which is good for whatever length of time they choose

## Adding an ROI to a New Client Record:

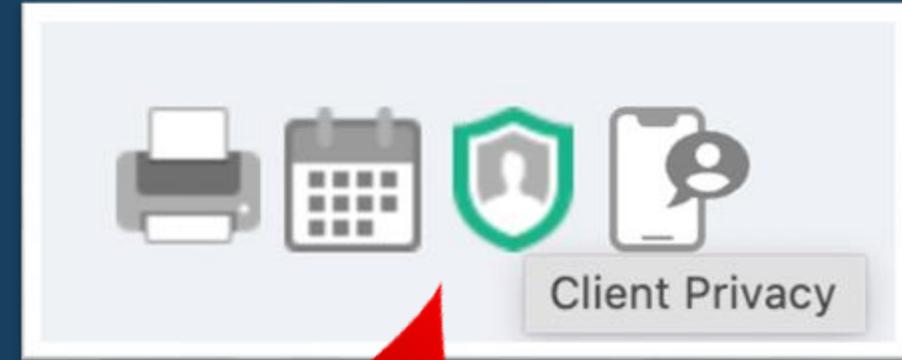
- The information box to the right must be completed

## Consent Documentation

- Electronic Signature: *E-Sign Document* button will display
- Attached PDF: *Select File* button will display to upload file

RELEASE OF INFORMATION	
Permission	Yes <input type="checkbox"/>
Start Date	04/22/2024 <input type="text"/>
End Date	04/22/2027 <input type="text"/>
Documentation	<input type="text" value="Select"/> <input type="text" value="Electronic Signature"/> <input type="text" value="Attached PDF"/>

# Managing the Client Record – Client Consent



**Luke Skywalker Test**

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

SEARCH

**CLIENT PROFILE**

Social Security Number	XXX - XX - 7391	
Quality of SSN	Full SSN Reported	
Last Name	Skywalker Test	
First Name	Luke	
Quality of Name	Full name reported	
Quality of DOB	Full DOB Reported	
Date of Birth	08/26/1974	Adult. Age: 49

**Connected**

UNIQUE IDENTIFIER  
53DA21C1D

**Household Members**

- Clara Test (She/Her/Hers)

**Active Programs**

- Gavilan College Homeless Prevention
- SER CSJ - Street Outreach
- Casitas de Esperanza

# Managing the Client Record – Client Consent

**PRIVACY**

Client Privacy      Public   Private   **Client data is used by other agencies**

**SAVE CHANGES**   **CANCEL**

**RELEASE OF INFORMATION**      ADD RELEASE OF INFORMATION (+)

Permission	Type	Start Date	End Date	Version	
Yes HomeFirst CA-500	Electronic Signature	04/30/2024	04/30/2027	V.5	

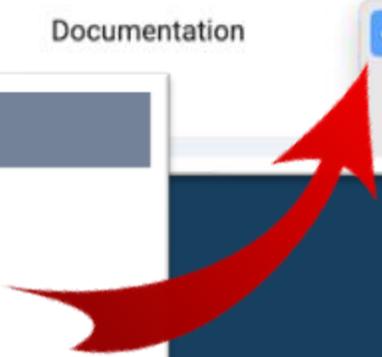
**RELEASE OF INFORMATION**

Permission: Yes

Start Date: 04/22/2024

End Date: 04/22/2027

Documentation: **Select**  
Electronic Signature  
Attached PDF



# Managing the Client Record

- The History tab is the "central hub" of the client record.
- It includes a complete history of the service items, program enrollments, referrals, reservations, assessments, and Coordinated Entry Events that have been recorded in a client record.

Luke Skywalker Test

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

HISTORY

Advanced search options Hide ^

Search  Category Any category Agency Any agency

Start Date  End Date  Type Any type

Coordinated Entry

Clear SEARCH

Service Name	Start Date	End Date
Referral: YHLP Rapid Rehousing (RRH) Razing the Bar referral to St. Andrew's Residential Programs for Youth (STAR) ⓘ	04/24/2024	Pending
Referral to RRH project resource opening:Referral to RRH project r... Razing the Bar ⓘ	04/24/2024	04/24/2024

# Managing the Client Record

- > The Global client tab includes the client's profile data, history, programs, any agency-level services or assessments, and notes, files, contact information, and location shared across HMIS
- > The Program client tab appears after you select your agency's program.

The screenshot displays a web interface for managing a client record. At the top, a dark grey header contains the client name "Luke Skywalker Test" and a "Global Tab" label. Below this, a navigation menu lists "PROFILE", "HISTORY", "PROGRAMS", "SERVICES", "ASSESSMENTS", "NOTES", "FILES", "CONTACT", and "LOCATION". The "PROGRAMS" tab is selected, leading to a sub-header with "PROGRAM: [CE] COUNTY: OSH" and a "Program Tab" label. Underneath, a secondary navigation bar includes "Enrollment", "History", "Events", "Assessments", "Notes", "Files", and an "Exit" button. The main content area shows the title "Enroll Program for client Luke Skywalker Test" and a form field for "Project Start Date" with the value "12/27/2023" and a calendar icon.

# Managing the Client Record

- > Clients who need permanent housing and/or subsidies must be referred to the Community Housing Queue
- > We have several Community Queues in this community and staff refer to the Community Housing Queue – only Matchmakers refer to the Admin Only/CET Queue

The screenshot displays the REFERRALS dashboard. At the top, there are navigation tabs: Dashboard, Pending, Community Queue, Analysis, Completed, Denied, Sent, Availability, and Open Units. The 'Community Queue' tab is selected. Below the tabs, there are buttons for 'Administration Only/CET' and 'Community Housing Queue', both of which are circled in red. To the right of these buttons are two more options: 'Emergency Shelter Queue - Households With Children' and 'Emergency Shelter Queue - Households Without Children'. Below the buttons, there are filters: 'Eligible Clients Only' (toggle), 'Date' (05/01/2024), 'Search' (input field), 'Active Agency' (System), 'Mode' (Standard), 'Characteristic' (-- Select --), and 'Sort By' (Default). A 'SEARCH' button is located at the bottom right. On the right side of the dashboard, there is a donut chart showing the status of referrals: 3 Pending (light purple) and 53 Completed (dark purple). A legend below the chart identifies the colors: light purple for Pending and dark purple for Completed.

# Managing the Client Record

- Referral History is at the bottom of each referral
- You can see what path the referral has followed and which staff have interacted with the referral

Luke Skywalker Test



Connected

UNIQUE IDENTIFIER  
53DA21C1D ⓘ

COMMUNITY QUEUE

Client has an active entry on the Community Queue: Emergency Shelter Queue - Households Without Children

[VIEW DETAILS](#)

[SEND MESSAGE](#)

HISTORY		
Activity	Date	Days Pending
Denied: Reassigned to Community Queue: Administration Only/CET	11/20/2023 2023-11-20 10:52:54	46
In Process: [CCP Housing Maintenance] Blossom Hill PBV, Santa Clara County Housing Authority (SCCHA)	10/05/2023 2023-10-05 08:27:39	0
Program Referral: [CCP Housing Maintenance] Blossom Hill PBV, Santa Clara County Housing Authority (SCCHA)	10/05/2023 2023-10-05 08:27:29	0
Added to Community Queue: Administration Only/CET	10/05/2023 2023-10-05 08:27:12	0



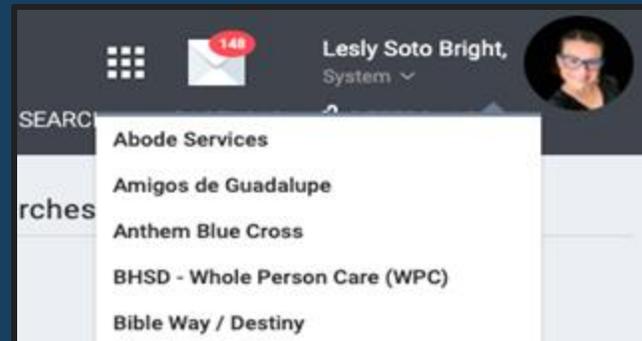
## Reporting: What tools are in Clarity?

# Report Library - Running a Canned Report

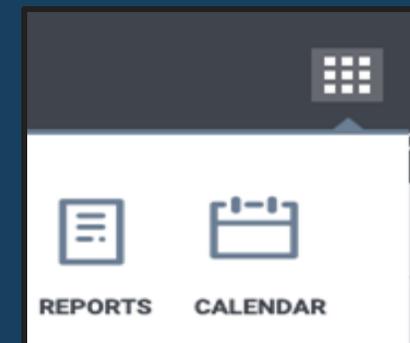
⇒ Log into HMIS



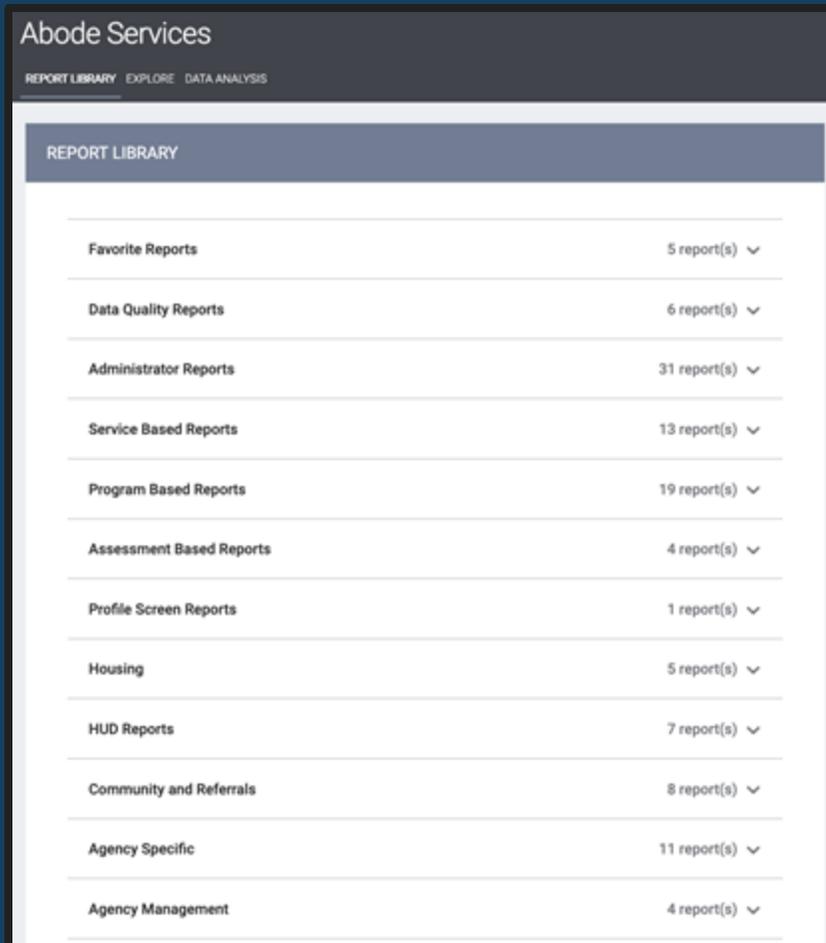
- ⇒ Your Access Role will determine the types of reports you will see
- ⇒ Select the Agency - if multiple access



⇒ Navigate to the Reports



# Report Library - Report Anatomy - Library Contents



The screenshot shows the 'Abode Services' interface with a 'REPORT LIBRARY' section. The table below lists the categories and the number of reports in each, with a dropdown arrow next to the count.

Category	Number of Reports
Favorite Reports	5 report(s)
Data Quality Reports	6 report(s)
Administrator Reports	31 report(s)
Service Based Reports	13 report(s)
Program Based Reports	19 report(s)
Assessment Based Reports	4 report(s)
Profile Screen Reports	1 report(s)
Housing	5 report(s)
HUD Reports	7 report(s)
Community and Referrals	8 report(s)
Agency Specific	11 report(s)
Agency Management	4 report(s)

- The **Report Library** is where all canned reports are housed
- Reports are separated by Category and listed in alphanumeric order within the category
- The right hand side column denotes the number of reports per category
- Using the caret will open up - in an accordion style - the different reports found in that category

# Report Library - Report Anatomy - Types of Reports

Abode Services

REPORT LIBRARY EXPLORE DATA ANALYSIS

REPORT LIBRARY

Favorite Reports	5 report(s) ▼
Data Quality Reports	6 report(s) ▼
Administrator Reports	31 report(s) ▼
Service Based Reports	13 report(s) ▼
Program Based Reports	19 report(s) ▼
Assessment Based Reports	4 report(s) ▼
Profile Screen Reports	1 report(s) ▼
Housing	5 report(s) ▼
HUD Reports	7 report(s) ▼
Community and Referrals	8 report(s) ▼
Agency Specific	11 report(s) ▼
Agency Management	4 report(s) ▼

<b>Favorite Reports</b>	Reports that are run very often using the same parameters can now be saved as “favorites”
<b>Data Quality Reports</b>	Reports that help identify DQ issues with data
<b>Admin. Reports</b>	Typically used to monitor staff and program utilization
<b>Service Based Reports</b>	Reports that are based on services provided to a client
<b>Program Based Reports</b>	Reports that are based on Program Data
<b>Housing</b>	Reports based on housing information - your program must offer housing
<b>HUD Reports</b>	Reports used to assist in DQ checks during Federal Reporting
<b>Community &amp; Referral</b>	Reports based on Assessment and/or Referral Data
<b>Agency Specific</b>	Reports that are specific to your Agency set-up - based on types of programs at your agency (in most cases these are custom)

# Report Library - How To Run Reports

1. Select the report from the report category of choice
2. Use the caret to expand the selection within the category
3. Find the report
4. You will see four options
  - Star** - use this to make the report a favorite
  - Run** - Begin running the report after you select the parameters
  - Schedule** - To have reports automatically run and then sent out
  - More Info** - Not sure what this report is about, click the MORE INFO and you will either see a description of the report or be redirected to a link with furth

The screenshot displays the 'REPORT LIBRARY' interface. At the top, there are two categories: 'Favorite Reports' and 'Data Quality Reports', each with a '6 report(s)' dropdown. Below, the 'Data Quality Reports' category is expanded, showing a list of reports. The first report is '[DQXX-102] Program Data Review' with icons for Star, Run, Schedule, and More Info. The second report is '[GNRL-106] Program Roster', which is highlighted with a yellow dashed box and a magnifying glass icon. Below this, a detailed view of the '[GNRL-106] Program Roster' report is shown, including a description: 'This program-based report lists program stay information for clients with the selected status in the selected programs. The status options are: Active within report date range- meaning that the client's project stay is active at least one day within the report date range (use this option to capture all clients active at any time within the date range), Enrolled within report date range- meaning the client's enrollment date is within the selected report date range, and Exited within report date range- meaning the client's exit date is within the selected report date range. Also, a client will be listed more than once if they have enrolled in a program more than once in the report date range, or if they have enrolled in more than one program when multiple programs are selected. Program Roster.'

# Report Library - Report Anatomy

REPORT LIBRARY

HUD Reports > [HUDX-225] HMIS Data Quality Report [FY 2022]

Switch Access Agency(-ies)

CoC Filter Category

CoC

Program Type(s)

Program Status

Continuum Project

Program(s)

Report Date Range

Report Output Mode

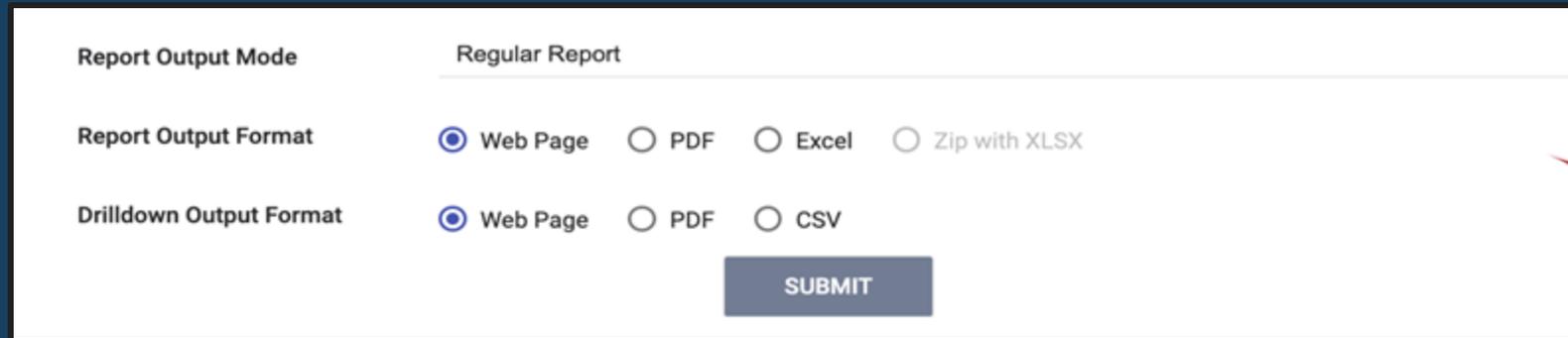
Report Output Format  Web Page  PDF  Excel  Zip with XLSX

Drilldown Output Format  Web Page  PDF  CSV

SUBMIT

<b>Switch Access Agency</b>	Select the Agency you want to run the report for - this will be dependent on access role
<b>CoC Filter Category</b>	Always select Agency CoC
<b>CoC</b>	Always select Santa Clara County
<b>Program Type</b>	Select the Project Type you want to pull data for (i.e., ES, TH, SH, PSH, Services only or Street Outreach, or ALL)
<b>Program Status</b>	Select from All, Active, or Inactive Programs - these are programs at your agency - what is listed will be dependent on access role
<b>Continuum Project</b>	Always select YES - unless directed differently from your Agency Lead
<b>Program(s)</b>	If not choosing ALL programs, then select only the ones you are interested in getting data for from the list provided
<b>Report Date Range</b>	Enter time frame you want to pull data for - the dates you want the report to pull

# Report Library - Report Anatomy



The screenshot shows a form with three sections: 'Report Output Mode' with a dropdown menu set to 'Regular Report'; 'Report Output Format' with radio buttons for 'Web Page' (selected), 'PDF', 'Excel', and 'Zip with XLSX'; and 'Drilldown Output Format' with radio buttons for 'Web Page' (selected), 'PDF', and 'CSV'. A 'SUBMIT' button is located at the bottom right of the form. A red arrow points from the right side of the form towards the right edge of the slide.

<b>Report Output Mode</b>	Depending on the report you are running, you may want a general report that is more concise or a details report that will show you more information and where it is pulled from specifically - not all reports will have this option	
<b>Report Output Format</b>	This depends on what you want to do with the data or how you want to see it	Web Page - will just populate on your screen PDF - will offer a downloadable PDF file Excel - will offer an Excel file
<b>Drilldown Output Format</b>	This option will pull the data, but it will link data directly to a client, this uses a hyperlink that will redirect you to the client and the specific data point being reviewed	

# Report Library - Report Anatomy

*This is another example of report parameters you will see in HMIS when running different types of reports.*

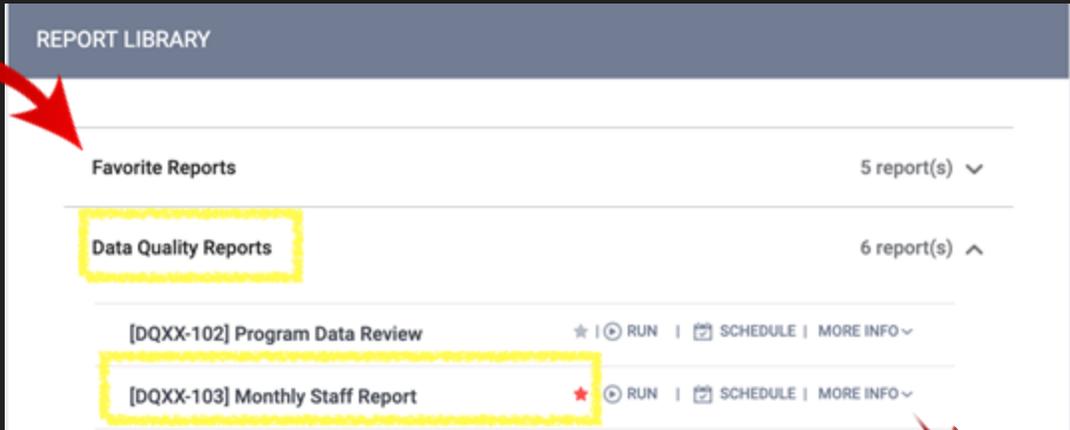
The screenshot shows a web interface titled 'REPORT LIBRARY'. Under 'Program Based Reports', there is a breadcrumb trail '> [GNRL-106] Program Roster'. A red arrow points from this breadcrumb to the 'Program(s)' field in the table below. The form includes several fields: 'Program(s)' with a dropdown menu showing options like 'All', 'Abode OSC Non-Funded', 'Abode OSC-CWG HUD', 'Bringing Families Home', 'CalWORKS HSP Prevention', and 'CALWORKS HSP Rapid Re-Housing'; 'Status' with a dropdown menu showing 'Choose...', 'Active within Report Date Range', 'Enrolled within Report Date Range', and 'Exited within Report Date Range'; 'Report Date Range' (empty); and 'Report Output Format' with radio buttons for 'Web Page' (selected), 'PDF', and 'Excel'. A 'SUBMIT' button is at the bottom.

<b>Program(s)</b>	Select the Program you want to run the report for - this will be dependent on access role	
<b>Status</b>	Select if you want to pull clients that are: Active within Report Date Range Enrolled within the Report Date Range Exited within Report Date Range	
<b>Report Date Range</b>	Enter time frame you want to pull data for - the dates you want the report to pull	
<b>Report Output Format</b>	This depends on what you want to do with the data or how you want to see it	Web Page - will just populate on your screen PDF - will offer a downloadable PDF file Excel - will offer an Excel file

# Report Library - Report Anatomy - Favorites

Have a report that is run often - save it as a Favorite

- ✓ From the Report Library identify the report category
- ✓ The  icon will set the report as a Favorite
- ✓ Now run the report and enter the selected parameters - once this is done the report will appear in your favorites list
- ✓ Check your Favorite Reports to see it listed



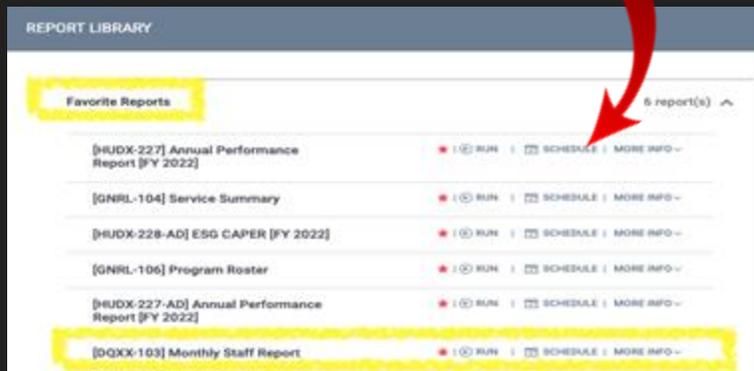
REPORT LIBRARY

Favorite Reports 5 report(s) v

Data Quality Reports 6 report(s) ^

[DQXX-102] Program Data Review ☆ | RUN | SCHEDULE | MORE INFO v

[DQXX-103] Monthly Staff Report ☆ | RUN | SCHEDULE | MORE INFO v



REPORT LIBRARY

Favorite Reports 6 report(s) ^

[HUDX-227] Annual Performance Report [FY 2022] ☆ | RUN | SCHEDULE | MORE INFO v

[GNRL-104] Service Summary ☆ | RUN | SCHEDULE | MORE INFO v

[HUDX-228-AD] ESG CAPER [FY 2022] ☆ | RUN | SCHEDULE | MORE INFO v

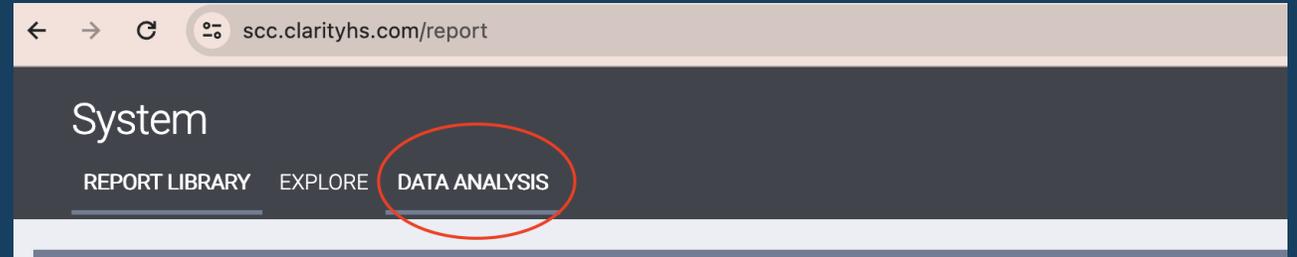
[GNRL-106] Program Roster ☆ | RUN | SCHEDULE | MORE INFO v

[HUDX-227-AD] Annual Performance Report [FY 2022] ☆ | RUN | SCHEDULE | MORE INFO v

[DQXX-103] Monthly Staff Report ☆ | RUN | SCHEDULE | MORE INFO v

# Report Library – Data Analysis tab reports

- ✓ The Data Analysis tab is prepopulated with Looker-based reports built by the CoC, Bitfocus, or other agency staff
- ✓ The Explore tab allows you to built and save a new Looker-based report



# Where can I learn more?



## Recorded Data Engagement (DEW)

4 of 4 lessons completed (100%)

Curriculum

About this course

### Course Overview

- ✓ ▶ Data Quality and AB 977
- ✓ ▶ Navigating the HMIS Report Library & Data Analysis 201 (September 2022)
- ✓ ▶ Navigating the HMIS Report Library & Data Analysis (June 2022)
- ✓ ▶ All Things Client Related - Data Entry 101 (March 2022)



# Scenarios - Hands on Learning

# DISCUSS WITH GROUP

Proposed Group Activities for 30 minutes

- **Breakout Group 1:** Run a program-based report [GNRL 400 vs GNRL 200] (Nate + Leila)
- **Breakout Group 2:** Run a program-based report [HUDX-225 vs APR] (Marcell)
- **Breakout Group 3:** Run a program-based report [HUDX-225 vs APR] (Lesly)
- **Main Room:** Continue demo on workflows, if needed (Angie)



Questions, Comments or Concerns?

## Reference Sheet:

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Workflow documents, FAQs, and pdf forms, visit the [Forms and Manuals page](#) on our website

Training recording website includes a lot of relevant recordings:

[Data Engagement Workshop](#) recordings:

>>>>> [Canned Reports training](#)

>>>>> [Looker Reports training](#)

# Report Categories

Favorite Reports	Reports that are run very often using the same parameters can now be saved as “favorites”
Data Quality Reports	Reports that help identify DQ issues with data
Admin. Reports	Typically used to monitor staff and program utilization
Service Based Reports	Reports that are based on services provided to a client
Program Based Reports	Reports that are based on Program Data
Housing	Reports based on housing information - your program must offer housing
HUD Reports	Reports used to assist in DQ checks during Federal Reporting
Community & Referral	Reports based on Assessment and/or Referral Data
Agency Specific	Reports that are specific to your Agency set-up - based on types of programs at your agency (in most cases these are custom)

# Resources

Contact Information	Type of Assistance
SCC-ADMIN@BITFOCUS.COM	<i>Use this email to contact your sys. admin. team: Angie and Lesly</i>
SCCSUPPORT@BITFOCUS.COM	<i>Use this email to contact the Help Desk. They can assist with almost everything, and if they can't they will loop your sys. admin. team.</i>
HELP.BITFOCUS.COM	<i>Use this to get help on all things HMIS. Type in your question in the search bar and get articles and how to steps.</i>
SCC.BITFOCUS.COM	<i>Use this to get insight into all things SCC HMIS related. From New User Training, to Forms and Newsletters and so much more! <b>If you have not already, you should bookmark this page.</b></i>