

# Quarterly Security Checklist Report: How to Guide

## Overview

This guide is aimed at assisting Santa Clara County HMIS Agency Leads in maintaining the security protocols outlined in the [Standard Operating Procedures](#) regarding quarterly compliance reviews. You will find the most up-to-date SCC HMIS Quarterly Compliance Certification Checklist form at [scc.bitfocus.com/forms-manuals](http://scc.bitfocus.com/forms-manuals)

## Compliance Certification Schedule:

- Quarter 1 (due by April 30th):  
New HMIS users or workstations created in Q1 (Jan 1-Mar 31)
- Quarter 2 (due by July 31st):  
New HMIS users or workstations created in Q2 (Apr 1-June 31)
- Quarter 3 (due by October 31st):  
New HMIS users or workstations created in Q3 (July 1-Sep 31)
- Quarter 4 (due by January 31st):  
ALL Active HMIS Users and Workstations for full calendar year, regardless of created date

In this guide you will find detailed instructions on running the Data Analysis Report: **New SCC Users : Quarterly Security Checklist**

Using the staff list generated by the report, please complete the form and provide to the Bitfocus team by the deadline associated with each quarter: [scc-admin@bitfocus.com](mailto:scc-admin@bitfocus.com)



# Using the Data Analysis Tab to Identify Staff for the Quarterly Security Checklist Report: How to Guide

## Steps to run the report

- From Login – navigate to the Search page in HMIS
- Under your name: Make sure your agency appears -the agency that appears under your name is indicating which "Switch" agency you are in
- Click on the Report Library square in upper right corner of screen next to your name and message box, then click: Reports
- Once the new page has populated, you will see 3 tabs: Reports, Explore, and Data Analysis
- Navigate to the Data Analysis tab
- Find Santa Clara County HMIS Reports, click the drop-down arrow next to the number of reports
- The Drop down will contain several buckets of reports, which are in bold - you can either scroll down to the Data Quality bucket – or use the web browser's search/find function and navigate to the report: "New SCC Users : Quarterly Security Checklist"
- Click on "Run" next to the report named "New SCC Users : Quarterly Security Checklist"
- In the top row of the report are the filters that can be adjusted
- Enter your agency name into the box labeled: "Agency Filter"
- Enter this quarter's dates into the box labeled: "Added Date"
- Run the report again by clicking the update button in the top right-hand corner of the report (*it looks like an arrow going in a circle*)
- Include the staff listed in your Quarterly Security Checklist form and email to [scc-admin@Bitfocus.com](mailto:scc-admin@Bitfocus.com) before or by deadline

# Quarterly Security Checklist Report

## Running the Report in the Data Analysis Tab

A) Login into HMIS

H) Click on "Run" next to the report "New SCC Users : Quarterly Security Checklist"

B) Ensure you are in the correct Agency (this is under your name/photo)

I) Enter your agency name into the box labeled: "Agency Filter"  
Enter this quarter's dates into the box labeled: "Added Date"

C) From the Launchpad/Rubik's cube, select the REPORT module

J) Run the report by clicking the update button in the top right hand

D) Once the new page has populated, you will see 3 tabs: Reports Library, Explore, and Data Analysis

K) You now have a list of the staff to include in your Quarterly Security Checklist form

E) Navigate to the Data Analysis tab

F) Select the Santa Clara County HMIS Reports, click the drop-down arrow next to the number (55)

G) You will see several reports listed; scroll down to the Data Quality section and select the "New SCC Users : Quarterly Security Checklist"

Quarter 1

Quarter 2

Quarter 3

Quarter 4