



Santa Clara County Continuum of Care



Universal Pass for Life Improvement From Transportation (UPLIFT)

User Guide

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Chapter 1 - Program Overview

What is UPLIFT?

The **Universal Pass for Life Improvement and Transportation (UPLIFT)** Program provides quarterly Valley Transportation Authority (VTA) transit passes to adults experiencing homelessness or who are at risk of homelessness. The goal of the UPLIFT program is to help clients attain or maintain housing or employment by improving access to public transit. The program is a partnership by the Santa Clara County Continuum of Care (SCC CoC), the VTA, and the City of San Jose and is operated by the Santa Clara County Office of Supportive Housing (OSH).

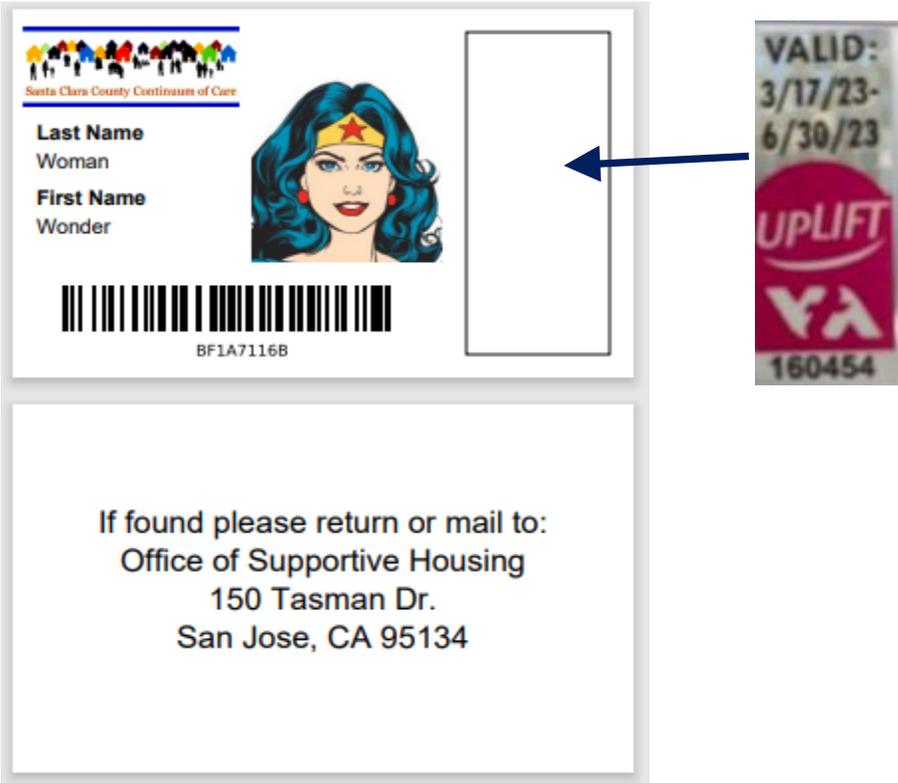


Eligibility Requirements

1. Client must be 18 years of age or older.
2. Client must be (as defined in Title 24 CFR 91.5 of the Code of Federal Regulations):
 - a. [homeless](#); OR
 - b. [at risk of homelessness](#).
3. Client must be currently receiving case management services once per month at minimum from the agency providing the transit pass.

What is an UPLIFT Transit Pass?

An UPLIFT transit pass consists of a Badge and a Sticker. Badges are reusable and should be retained by the client. Stickers are valid for one quarter. The front of the badge contains a space to affix the valid sticker.



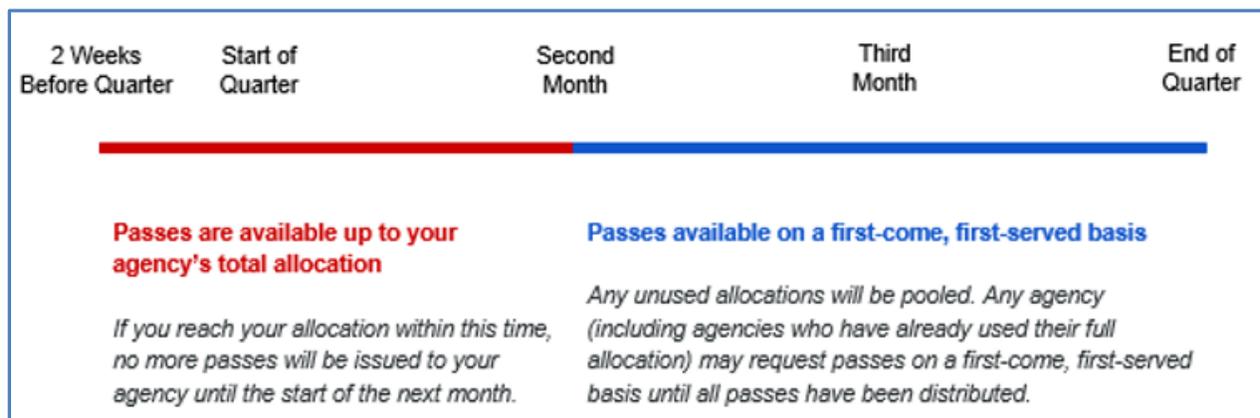
Quarterly Allocations

- Each quarter, every participating agency is provided with an **allocation**. An allocation is the number of passes reserved for that agency *for the first month of the given quarter*. This allocation may change each quarter based on use and availability. Each agency's designated UPLIFT Program Coordinator receives a survey prior to the start of each quarter to request the number of passes the agency expects to need for the upcoming quarter. THERE ARE NO GUARANTEES THAT AN ALLOCATION REQUEST CAN BE MET.
- The first business day of the second month of each quarter is the start of the **pooled pass period**. On this date, any unused allocations are pooled and available to all participating agencies on a first-come, first-served basis. See below for timing and more information on this process.
- Check with your agency's UPLIFT Program Coordinator or email the UPLIFT Administrator at UPLIFT@hhs.sccgov.org for your agency's allocation for a given quarter.

Timelines for Requesting UPLIFT Transit Passes

- The **request date** is defined as the (1) Program Date for new clients being enrolled or (2) the Project Status Date for continuing clients. New clients and Continuing clients are defined later in this guide.
- **Two weeks before the start of the quarter:** the earliest request date for a new quarter is **on the Friday closest to the 17th**. Please check the most recent UPLIFT calendar distributed by OSH for exact dates. Reminder emails with pertinent dates are sent to the UPLIFT mailing list ahead of each new quarter. **The earliest request date is not flexible. All requests must be dated on or after this date. For example, if the earliest request date is Friday, 6/16 and you submit a request dated Thursday, 6/15, the request will not be fulfilled and will be removed from the HMIS.**
- **Through the end of the first month of the quarter:** An agency's allocation is the maximum number of passes the agency can request during the first month of the quarter. If your agency reaches its allocation limit prior to the end of the first month of the quarter, no more passes will be issued to your agency and any requests submitted will be removed from the system. These requests may be re-submitted at the start of the pooled pass period referenced below.

- In the second and third month of the quarter:** on the first day of the second month of the quarter, any remaining unused passes will be pooled. Any agency (including those who have already used up their allocation) may request passes during this pooled pass period. Pass requests during this time are provided on a first-come, first-served basis until all available passes have been distributed.



Example: Calendar Year 2023 Schedule

Quarter	Earliest Request Date for UPLIFT Pass	Allocations in Effect: Request Passes up to your agency's total allocation	Pooled Pass Period: First day to request passes on a first-come, first-served basis until no more passes are available
January - March	12/16/2022	12/16 - 1/31/2023	2/1/2023
April - June	3/17/2023	3/17 - 4/30/2023	5/1/2023
July - September	6/16/2023	6/16 - 7/31/2023	8/1/2023
October - December	9/15/2023	9/15 - 10/31/2023	11/1/2023

UPLIFT Processing at the Office of Supportive Housing (OSH)

- UPLIFT passes are processed regularly by the UPLIFT Administrator at OSH. If a request has not been fulfilled within 5 business days of submission, this likely means that there was an error with the request. In this case, please email the UPLIFT Administrator at UPLIFT@hhs.sccgov.org.
- The OSH UPLIFT Administrator will send an email to the UPLIFT mailing list when a new batch of passes has been processed. The email will provide a list of the badges and stickers that are ready for pick-up at the OSH. Passes that are unable to be processed are often due to the following errors: missing/unusable photo, invalid ROI, or wrong quarter selected.
- You can monitor your UPLIFT requests in HMIS by using [Monitor Status of UPLIFT Request \(Chapter 6\) process](#).

Chapter 2 - Program Policies and Expectations

Participating Agencies:

- Designate an **UPLIFT Program Coordinator** for the agency. Duties for this role are detailed in the document on the [UPLIFT website](#) titled “UPLIFT Program Coordinator Role.”
- Maintain program data quality in HMIS. EXIT clients from the program as soon as th
- Attend meetings to facilitate communication, training, coordination, and evaluation of the program as needed.
- Monitor client’s usage of the UPLIFT pass to prevent fraud, abuse, and any unauthorized use of the UPLIFT passes.
 - Impose sanctions (in consultation with the Santa Clara County (SCC) UPLIFT Administrator) on any participant who violates UPLIFT or VTA policies. Any client who attempts to transfer or sell an UPLIFT pass is subject to being barred from participation in the program.
 - Inform the UPLIFT community via HMIS Public Alert of an UPLIFT sanction.
- Complete a Corrective Action Plan (CAP) for any lost or missing sticker due to the Agency’s loss or mishandling of the UPLIFT pass:
 - First incident in one (1) calendar year: CAP signed by the Agency’s UPLIFT Program Coordinator.
 - Second incident in one (1) calendar year: CAP signed by the Agency’s Executive Director. The County may impose corrective measures which may include the Agency’s disqualification from the program.
 - Third incident in one (1) calendar year: CAP signed by the Agency’s Executive Director. The Agency will be suspended from the program until an audit is completed by the UPLIFT Administrator at OSH.

Participating Agency Staff:

- Provide, at a minimum, monthly case management and document in the HMIS.
- Affix the sticker onto client’s existing badge. **NEVER HAND A CLIENT A STICKER!**
- Ensure before requesting a pass for your client that the client is NOT receiving UPLIFT services at another agency.
 - Sometimes clients are receiving case management services at more than one agency. In these cases, it is essential that UPLIFT staff from each agency work together to determine which agency will be requesting an UPLIFT pass for the client. [At this link, you’ll find a full list of UPLIFT Program Coordinators at each participating agency as well as their contact information.](#)
 - You can check to see if a client is already enrolled in an UPLIFT program by clicking on the “Programs” tab in your client’s HMIS profile and looking for an open enrollment that includes the term “[UPLIFT].”

- Provide sufficient details to make requests and correct UPLIFT request errors.
 - UPLIFT users incurring more than 3 (three) errors per quarter will have their access to the UPLIFT program in HMIS removed until they have retaken the UPLIFT training. Errors are defined as any issue that results in the inability to fulfill the UPLIFT request, including but not limited to badge requests with no photo or an unusable photo, invalid ROIs or other ROI issues, or wrong quarter selected.

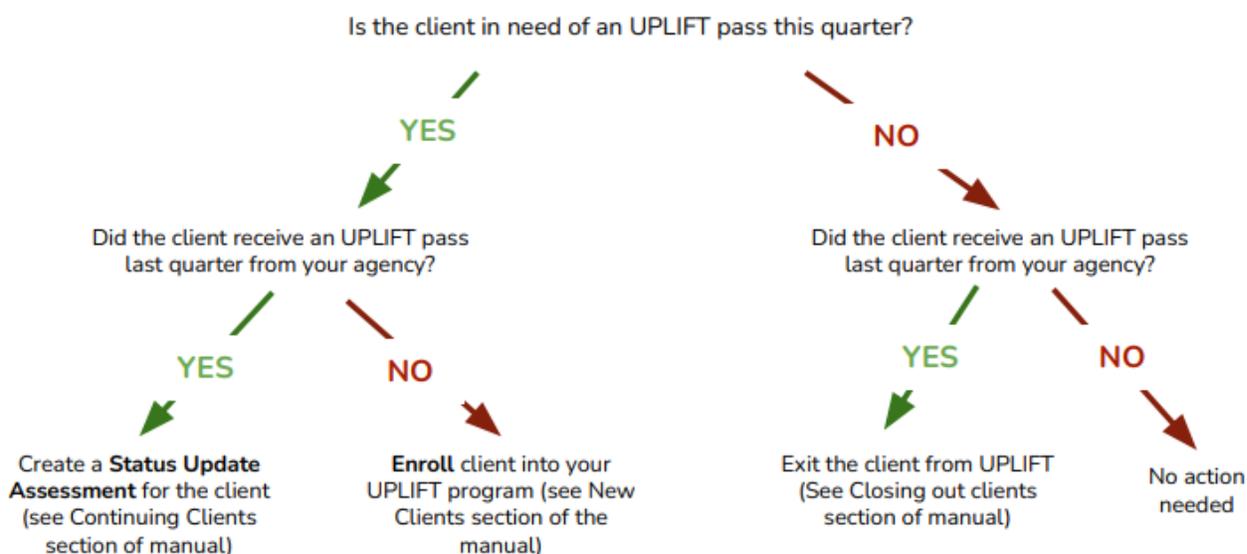
Note that the Santa Clara County Office of Supportive Housing reserves the right to suspend UPLIFT access for any user violating UPLIFT Program policies or procedures.

Chapter 3 - Requesting UPLIFT Passes

General Procedures

- A request for an UPLIFT pass consists of either an UPLIFT program enrollment for a new client OR a Status Update Assessment for a continuing client.
- Each quarter, UPLIFT staff will either:
 - Enroll **new** UPLIFT clients into your agency's UPLIFT program to request a badge and sticker.
 - Create a Status Update Assessment to request a sticker for **continuing** UPLIFT clients. If the client needs a new badge, this can be requested as well.
 - **Promptly** exit clients from the UPLIFT program if you will not be requesting a pass for them for the quarter.
- Other requirements:
 - Adhere to HMIS processes and procedures
 - Review your client's ROI: OPEN the ROI containing the latest Start Date and review it. Ensure ROIs do not have overlapping dates.
 - Provide a face photo in the client's HMIS profile if requesting a badge.

UPLIFT Decision Tree



Requesting an UPLIFT Pass for New Clients

For UPLIFT, a **New Client** is defined as a client who does not already have an open UPLIFT enrollment.

Note: Clients with an open enrollment who did not receive a pass for the most recent quarter should be exited from the program. If a new pass is needed, a new enrollment must be created.

----- UPLOAD OR EDIT A PHOTO FOR THE ID BADGE

A photo is **required** when you are requesting a badge for a new UPLIFT client. Go to the client's profile page and upload a **clear, front-facing full head** photo. If there is already an existing photo, edit or crop it if necessary.

** Make sure you review the client's most recent ROI to ensure that they provided permission to share a photo in HMIS by initialing next to "My photograph or other likeness." **

Wonder Woman

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

CLIENT PROFILE

Social Security Number	XXX-XX-0101
Quality of SSN	Approximate or partial SSN reported
Last Name	Woman
First Name	Wonder
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	12/16/1968 Adult Age: 54
Middle Name	Suffix: None
Alias	
Gender	Female
Race	White
Ethnicity	Client doesn't know
Pronouns	Select
Veteran Status	No

UNIQUE IDENTIFIER
BF1A7116B

Make sure the Client is an adult and has a valid ROI. **OPEN THE ROI TO ENSURE IT IS VALID.**

If requesting a badge, make sure client provided consent in the ROI to share their photo

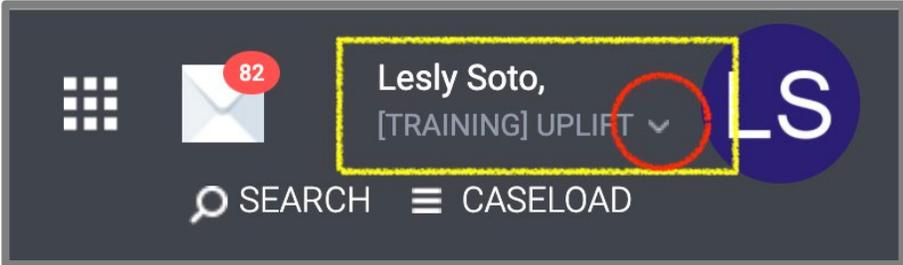
Photo must be clear, front-facing, and show the entire head, Sunglasses and masks must be removed.

COMPLETE A VI-SPDAT IF APPROPRIATE

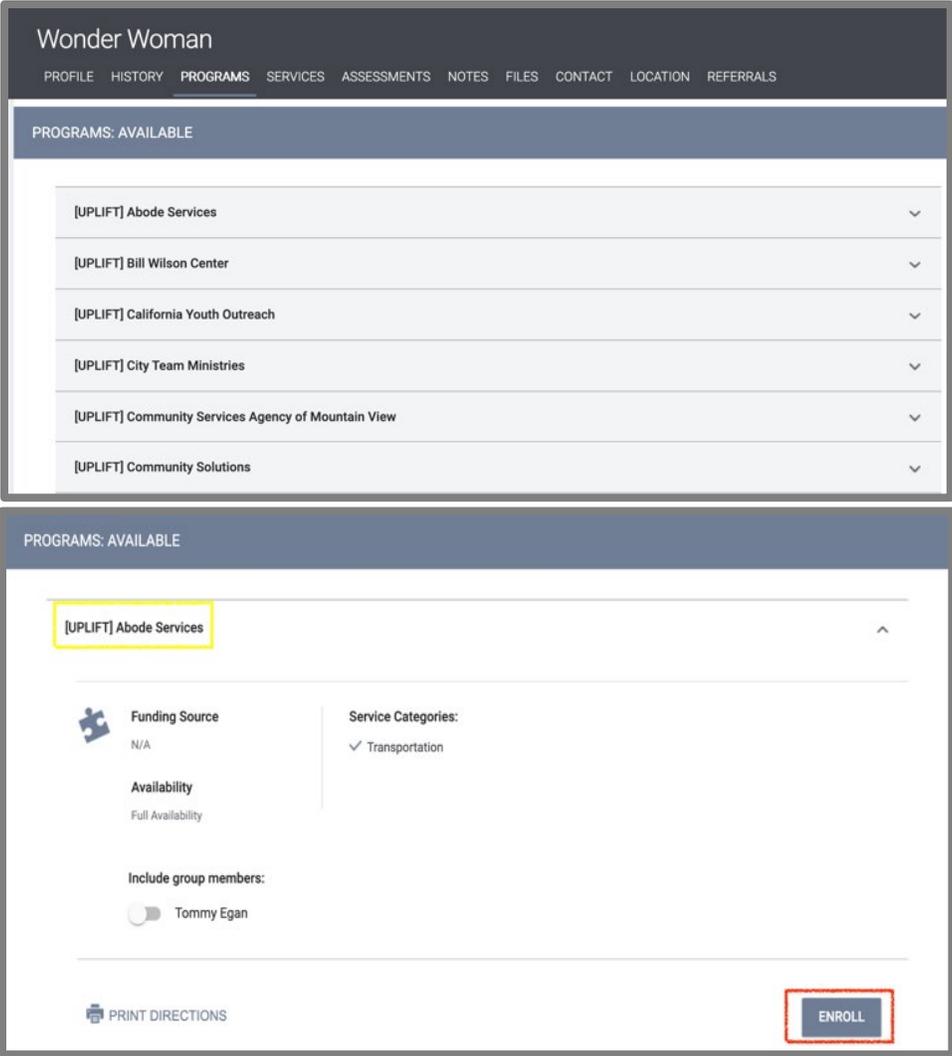
Note: Only staff that have completed the required training should administer the VI-SPDAT.

First, determine if there is an existing (current) VI-SPDAT by clicking on the ASSESSMENTS tab in the client's profile and scrolling to the bottom of the page. **If there is not a current VI-SPDAT and the client is homeless, complete one with the client and enter it in the Assessments tab of the UPLIFT program enrollment.** You'll find detailed information about when you should complete a VI-SPDAT here: ["When Should I Do a VI-SPDAT"](#).

1. SWITCH TO THE UPLIFT AGENCY IN HMIS



2. Enroll the client into your agency's UPLIFT program. Identify your agency from the list of options, select the **Enroll** option, and complete the responses accordingly.

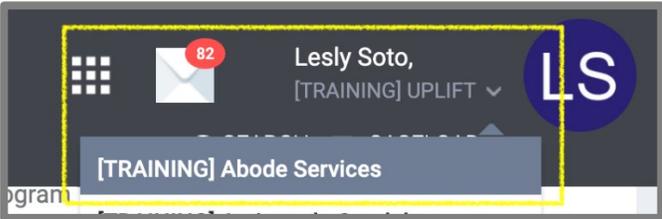


Program Date	08/13/2021
Zip Code of Last Address	896787
UPLIFT ELIGIBILITY AND REFERRAL	
Is the client homeless?	Yes
Is the client currently receiving case management from your agency?	Yes
What type of transit pass are you requesting?	Badge and Sticker
What quarter is the pass for?	Jul-Sep
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response)
PRIOR LIVING SITUATION	
Type of Residence	Safe Haven
Length of Stay in Prior Living Situation	One night or Less
Approximate Date Homelessness Started	07/05/2021
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	One month (this time is the first month)

For a new client who does not already have a badge, select "Badge and Sticker" and the correct time frame (quarter) for the pass. (If the client already has a badge from a previous enrollment, select "Sticker.")

Once you have completed the items in on the enrollment screen, be sure to select "SAVE & CLOSE" at the bottom of the page.

3. SWITCH BACK TO YOUR HOME AGENCY



New Client Request Recap

- *Switch to the UPLIFT agency*
- Make sure the client has a valid ROI!
- Make sure the client is an adult (18 or older)
- If you are requesting a badge for the client, make sure a clear face photo is uploaded/provided
- If client is homeless and does not have a valid VI-SPDAT, complete a VI-SPDAT
 - You'll find detailed guidelines for when a VI-SPDAT must be administered here: [When should I do a VI-SPDAT?](#)
- Enroll client into your agency's UPLIFT program
- *Switch back to your home agency when you are done*

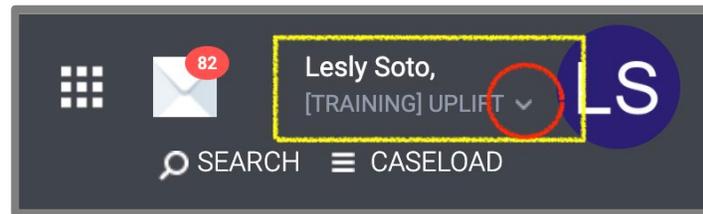
Requesting an UPLIFT Pass for Continuing Clients

For UPLIFT, a **Continuing Client** is defined as a client who both:

- Received an UPLIFT pass from your agency in the most recent quarter AND
- Has an open UPLIFT program enrollment with your agency.

** Clients with an open enrollment who did not receive a pass for the most recent quarter should be exited from the program. If a new pass is needed, a new enrollment must be created. **

1. SWITCH TO THE UPLIFT AGENCY IN HMIS



2. Search for the client you are working with. Under the PROGRAMS tab find the UPLIFT program for your agency in the PROGRAM HISTORY. Select and open the program.

Wonder Woman

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

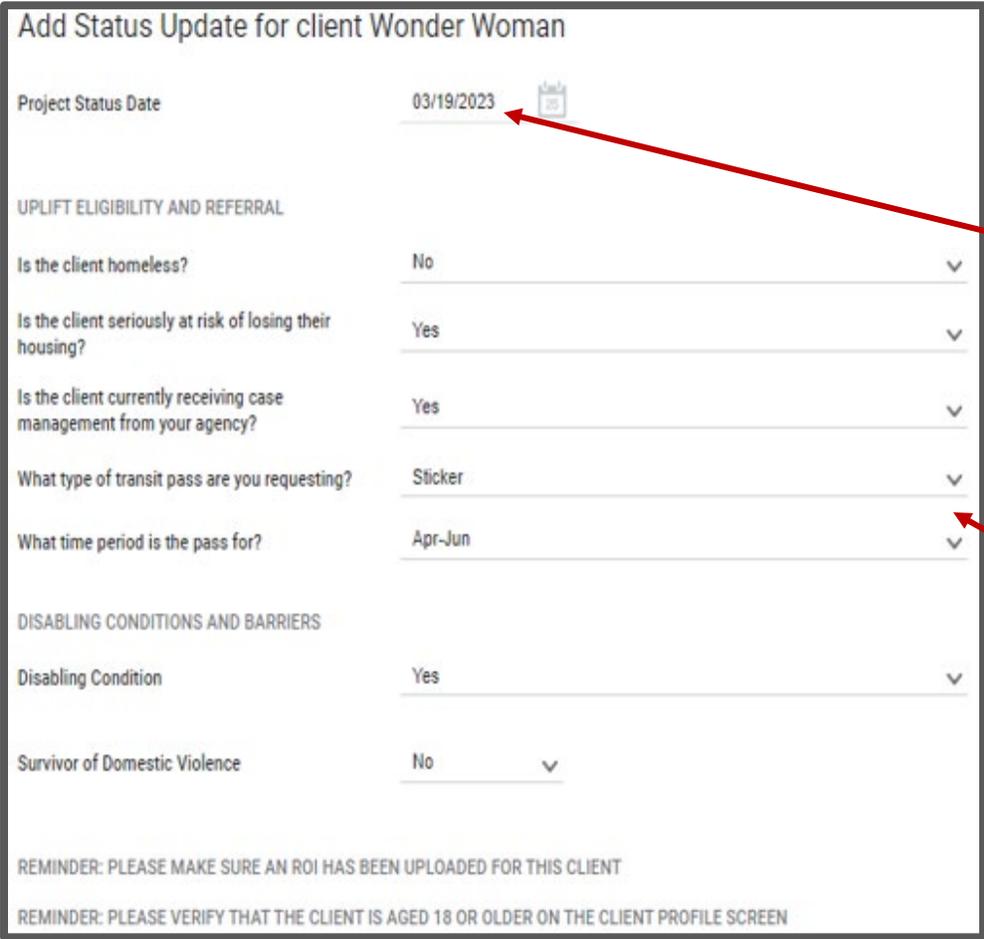
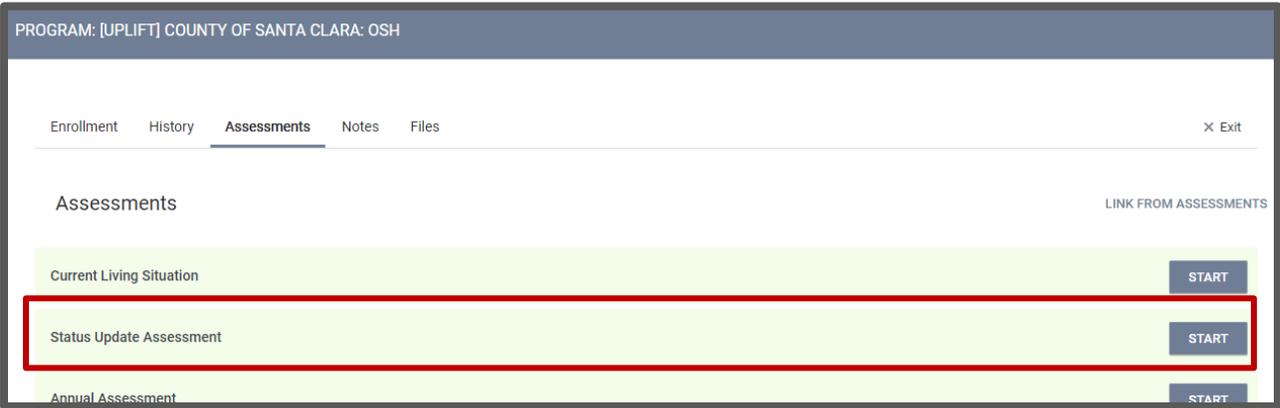
PROGRAM HISTORY

Program Name	Start Date	End Date	Type
[UPLIFT] County of Santa Clara: OSH Services Only UPLIFT ⓘ	03/19/2023	Active	Individual
LifeMoves-JSI-ES-Mental Health Emergency Shelter: Entry/Exit Date LifeMoves ⓘ	06/27/2022	Active	Individual
[HPS - OSH] LifeMoves Villa Prevention Program Homelessness Prevention	06/02/2022	07/07/2022	Individual

Before entering ANY data, make sure the client's ROI is still valid. If not, please upload a new ROI.

Only enter in data the client consented to release on their ROI.

3. CREATE A STATUS UPDATE ASSESSMENT

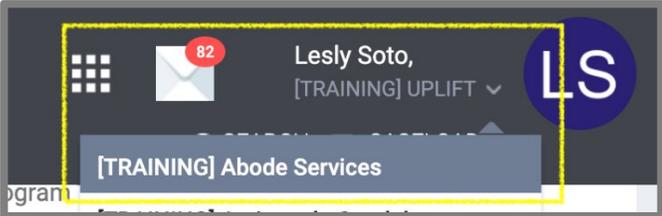


DO NOT backdate the Project Status Date – always use the current date!

Update all items in UPLIFT ELIGIBILITY AND REFERRAL section– **make sure you’ve selected the correct quarter and transit pass type**

Update any other information that has changed.

4. SWITCH BACK TO YOUR HOME AGENCY



Continuing Client Recap

- *Switch to the UPLIFT agency*
- Make sure the client's ROI is valid
- Open the client's UPLIFT program enrollment
- Create a Status Update Assessment
- *Switch back to your home agency when you are done*

Chapter 4 - Exiting a Client from the UPLIFT Program

Note that clients should be exited from the UPLIFT program if they “skip” a quarter (they do not receive a pass for a given quarter). Clients are only considered “continuing” if they receive a pass every quarter.

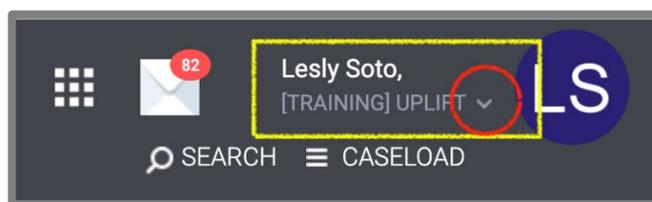
Exit the client from the program if:

- You will not be requesting a pass for the client this quarter.
- You are no longer working with the client
- The client is no longer eligible for the program

Note: If you are exiting the client from UPLIFT, please wait until you receive the client’s UPLIFT pass before you exit them from the program.

STEPS TO EXIT A CLIENT

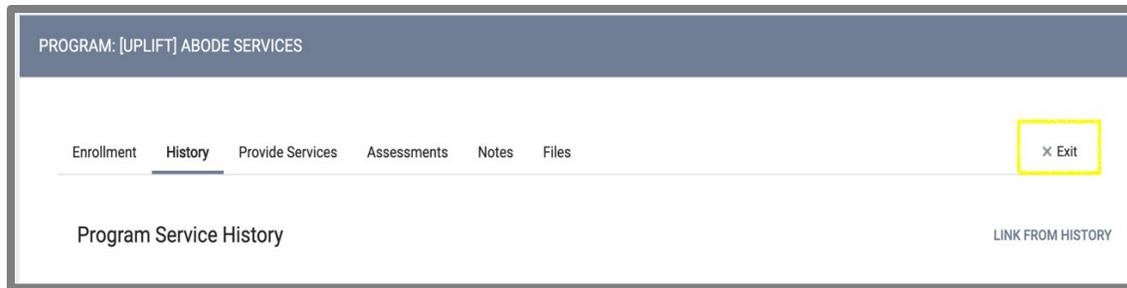
1. Switch to the UPLIFT agency.



2. Go to client’s UPLIFT program enrollment.

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
Housing Problem Solving Program Other Program Type Abode Services ⓘ	09/10/2021	Active	Individual
[UPLIFT] Bill Wilson Center Services Only UPLIFT ⓘ	08/31/2021	Active	Individual
[CE] Victory Outreach Coordinated Entry Victory Outreach ⓘ	08/26/2021	Active	Individual
[Ei - DH] JobTrain - Employment & Training Services Only JobTrain ⓘ	08/23/2021	Active	Individual
[UPLIFT] Abode Services Services Only UPLIFT ⓘ	08/13/2021	Active	Individual

3. Select the EXIT option to the far right. This will allow you to enter an exit date and exit the client.



4. Be sure to double check and update any information that has changed since the client was enrolled.

Note the Project Exit Date will auto-populate to the current date; enter correct date if different from current date.

Once you have updated any necessary information, select SAVE.

Exiting a Client Recap

- *Switch to the UPLIFT agency*
- Go to the client's UPLIFT program enrollment
- Exit the client from your agency's UPLIFT program
 - Make sure to enter the exit destination and update the other information in form as appropriate
- *Switch back to your home agency when you are done*

Chapter 5 - Special Procedures

Replacement of Lost or Stolen Passes

Replacement passes for clients who have lost their pass or had it stolen may be requested during the pooled pass period if there are still unused passes available. Passes will not be replaced more than once per quarter. The County reserves the right to decide whether a pass will or will not be replaced.

To request a replacement pass, you must:

1. Create a Status Update Assessment **AND**
2. Email UPLIFT@hhs.sccgov.org explaining the circumstances under which the pass was lost or stolen.

Sample lost/stolen pass explanation:

“Client HMIS# A999999A came to the office stating that his bus pass was stolen. He is currently homeless and stated that he got tired and fell asleep in the park and when he woke up his belongings were missing. He and I explored different options including getting him a lanyard or a badge holder to prevent re-occurrence.”

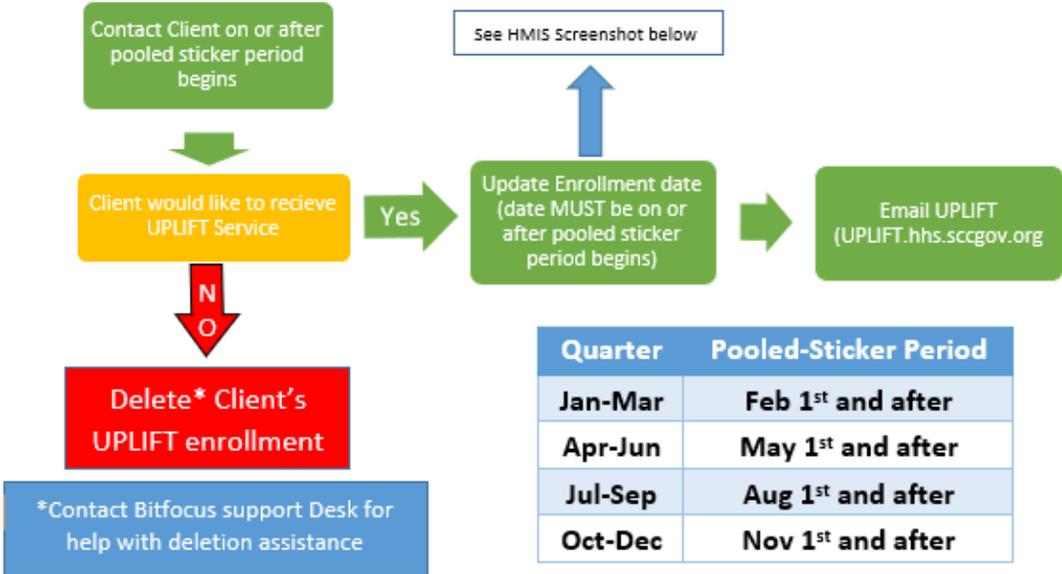
Quarter	Replacement Period
Jan-Mar	Feb 1 st and after
Apr-Jun	May 1 st and after
Jul-Sep	Aug 1 st and after
Oct-Dec	Nov 1 st and after

Unfilled Request Due to Allocation Limit

If your pass request was not fulfilled because your agency reached its allocation limit, follow the procedures outlined below.

Unfilled UPLIFT Request due to Allocation Limit

New Client - Flowchart



Unfilled UPLIFT Request due to Allocation Limit

New Client – Flowchart – HMIS Screenshot How to change Program Entry Date

Enroll Program for client Wonder Woman

PROGRAM: [UPLIFT] COUNTY OF SANTA CLARA

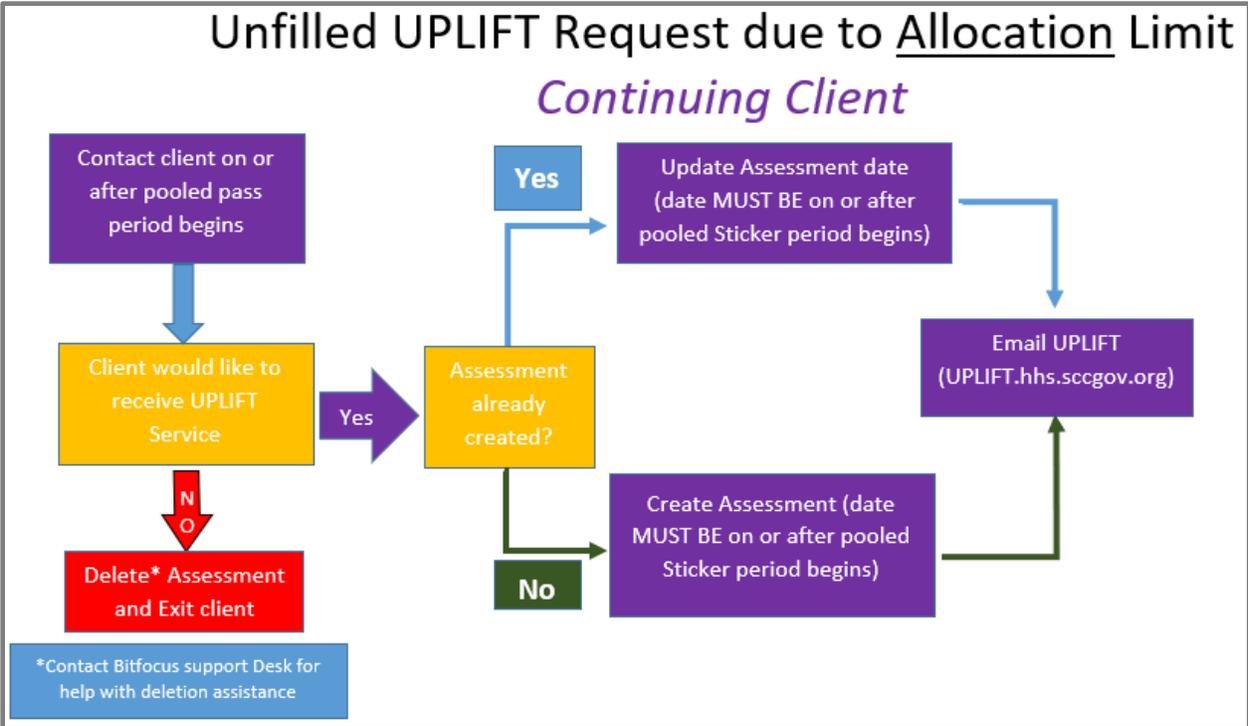
Then Update Here → Project Start Date: 08/01/2018

Enrollment | History | Provide Services | Assessm

Click Here

UPLIFT ELIGIBILITY AND REFERRAL

Is the client homeless or seriously at risk of losing their housing? Select



Chapter 6 - Monitor Status of UPLIFT Request

You can determine whether your UPLIFT request has been fulfilled using HMIS. To do this:

1. Go to the client's UPLIFT program enrollment:

PROGRAM HISTORY			
Program Name	Start Date	End Date	Type
[UPLIFT] County of Santa Clara: OSH Services Only UPLIFT ⓘ	03/19/2023	Active	Individual

2. Click on the History Tab and look for the badge and/or sticker service. If the Service End Date is...
 - Before your request, the pass has not been processed.
 - After your request, the pass has been processed.
3. If no services appear in the History tab, the UPLIFT request has not been processed.

PROGRAM: [UPLIFT] COUNTY OF SANTA CLARA: OSH					
Enrollment	History	Provide Services	Assessments	Notes	Files
Program Service History					
Service Name	Start Date	End Date	LINK		
Admin Use Only [UPLIFT] County of Santa Clara: OSH Transit Pass:Sticker UPLIFT ⓘ	03/21/2023	03/21/2023			
Admin Use Only [UPLIFT] County of Santa Clara: OSH Transit Pass:Badge UPLIFT ⓘ	03/21/2023	03/21/2023			

Status	Date of UPLIFT Request (in Enrollment or Status Update Assessment)	Service End Date
Request has been processed	3/19/2023	3/21/2023
Request has NOT been processed	3/19/2023	1/3/2023

Chapter 7 – Helpful Reports

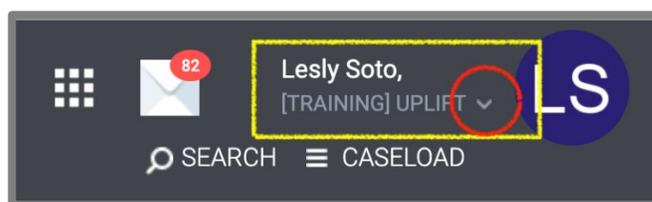
Two reports are available to assist UPLIFT Program Coordinators and UPLIFT staff. The first allows you to track your agency's sticker utilization as well, and the second will identify your current agency UPLIFT users for the purposes of disseminating important information.

If you would like a step-by-step demo on running these reports, email the UPLIFT Administrator at UPLIFT@hhs.sccgov.org.

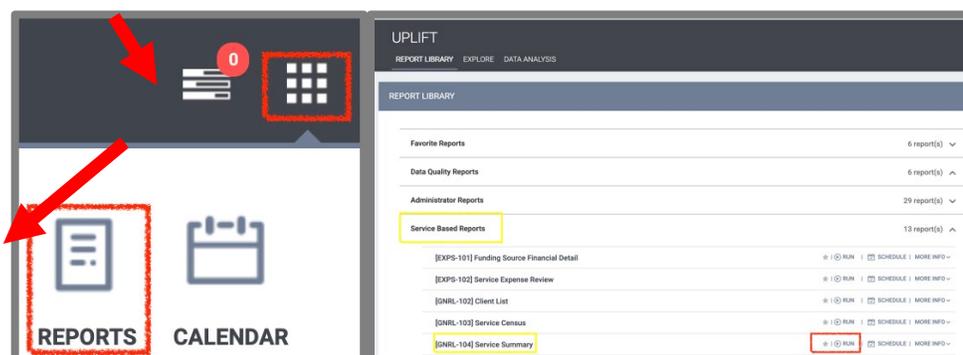
The process for running the report to agency utilization is described below. Running this report will, for example, allow you to see how many stickers are left before your agency has used up its first month allocation. You'll find your agency's first month allocation in an email you receive prior to each quarter. The email contains the subject line "Your agency's UPLIFT allocation for (month)."

Report for Tracking Agency UPLIFT Utilization

1. First, switch to the UPLIFT Agency in Clarity HMIS



2. Select the **REPORTS** tab from the Launcher on the top right-hand side of your Clarity HMIS home page. this will open the **REPORT LIBRARY**. Click on the Service Based Reports Tab, then select the **[GNRL-104] Service Summary** report. Select **RUN** to open report filters and then RUN the report.



3. After clicking on "Run," Enter all the necessary filters: first select the Service Item(s) you want to view data for, then in the Report Date Range fields select the first date of the quarter for the start date and the current date for the end date. Finally, under

Report Output Format, select the format in which you'd like to view the report. PDF is recommended. See the example report below. In this example, we want to view the number of stickers UPLIFT Agency XX has received since the first day of the quarter (3/17/2023) through the current date (4/12/2023).

Note: If you would like to pull two different types of reports at the same time (e.g., badge and sticker), hold down the Ctrl key while selecting.

REPORT LIBRARY

Service Based Reports > [GNRL-104] Service Summary [Service Based]

Service: Service Item(s)

Admin Use Only [UPLIFT] Abode Services Transit Pass: Sticker

Admin Use Only [UPLIFT] Agency Transit Pass: Badge

Admin Use Only [UPLIFT] Agency Transit Pass: Sticker

***Admin Use Only* [UPLIFT] Agency XX Transit Pass: Sticker**

Admin Use Only [UPLIFT] Amigos de Guadalupe Transit Pass: Badge

Report Date Range 03/17/2023  - 04/12/2023 

Report Output Format Web Page PDF Excel

SUBMIT

The resulting report below shows that this agency has used up 4 stickers from the first date of the start of the April – June quarter (3/17/2023) through the current date (4/10/2023). This is indicated by the “# of Services” field.

Service Summary [Service Based]	UPLIFT Date Range: 03/17/2023 thru 04/10/2023		
Admin Use Only [UPLIFT] Agency XX Transit Pass	Unique Clients	# of Services	# of Service Days
Sticker	4	4	4

Report to Identify UPLIFT Users at Your Agency

This report will provide a list of your agency's UPLIFT users. This is helpful for the purposes of gathering information about future allocation needs as well as sharing agency-specific information such when the agency's first month allocation has been reached.

1. First, switch to the UPLIFT Agency in Clarity HMIS:



2. Select the **REPORTS** tab from the Launcher on the top right-hand side of your Clarity HMIS home page. Click on the Data Analysis tab and open the section named “Santa Clara County HMIS Reports.”

REPORT LIBRARY	EXPLORE	DATA ANALYSIS
DATA ANALYSIS		
Built In Reports		5 report(s) ▾
Santa Clara County HMIS Reports	←	78 report(s) ▾
County: OSH Reports		33 report(s) ▾

3. Scroll down to the UPLIFT section and select **RUN** next to the report named “UPLIFT current users.”

UPLIFT	
UPLIFT - check for already processed	▶ RUN
UPLIFT current users	▶ RUN
UPLIFT Enrollments Q4 Apr- Jun 2023	▶ RUN
UPLIFT Status/Annual Updates Q4 Apr- Jun 2023	▶ RUN
VA Master List Links	

On the next page, you’ll see the Filters header at the top. Under Filters, click on the box next to the “Agencies Agency Name” filter. Select or type in your agency name, then click the “Run” button on the top right side of the page. A list of your agency users and their email addresses will appear under the Visualization section under Filters.

Type in or select your agency's name

The screenshot shows the 'UPLIFT current users' interface. At the top, there is a filter bar labeled 'Filters (4)'. Below this, four filter criteria are listed:

- Agencies Agency Name**: The operator is 'is equal to'. The input field is empty and highlighted by a red oval and a red arrow pointing to it from the text box above.
- Member Additional Agencies Agency Name**: The operator is 'is equal to'. The input field contains 'UPLIFT' with a close button (x).
- Staff Deleted (Yes / No)**: The operator is 'is'. The input field contains 'No' with a close button (x).
- Staff Status**: The operator is 'is not equal to'. The input field contains 'Inactive' with a close button (x).

Chapter 8 – Resources

- UPLIFT website: <https://scc.bitfocus.com/uplift>
- UPLIFT Administrator Email: UPLIFT@hhs.sccgov.org
- Clarity HMIS Help Desk: sccsupport@bitfocus.com