MyConnectSV:

Santa Clara County HMIS Customer Portal

Provider Training

Bitfocus

Agenda

- About **MyConnect**SV
- Client-Facing Functionality
  - Feature Overview
- Provider Functionality
  - Extending Invites
  - Sending Requests
  - Account Disconnection Process
- Client Support Process
- Provider Resources

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About MyConnectSV

MyConnectSV is the Santa Clara County HMIS Customer Portal

MyConnectSV Development Process

Tech Needs Assessment

Concept for **MyConnect**SV was a result of the Santa Clara County Supportive Housing System Tech Needs Assessment

Collaborative Development

Developed by Bitfocus in collaboration with Lived Experience Advisory Board, Destination: Home, and the County of Santa Clara Office of Supportive Housing

Lived Expertise

The project team consulted with individuals with lived experience through the development & design process

Elevating Access

Designed to elevate access and agency for individuals experiencing homelessness

Provider Expectations

Review Training and Support Materials
Review training materials provided

Provide Support to Clients
Help clients get connected & refer them to additional information and support

Send MyConnectSV Invitations Through HMIS
Invite clients through Clarity

Utilize MyConnectSV Features
Use in your case management process!

Client Support

Direct Clients to Resources

Show clients where to access client-facing instructions & videos and how to connect with the local Peer Support team.

Help Create an Account

If requested, help them create their account.

Help Escalate Any Technical Issues

If clients experience technical issues using **MyConnect**SV, alert the Help Desk.

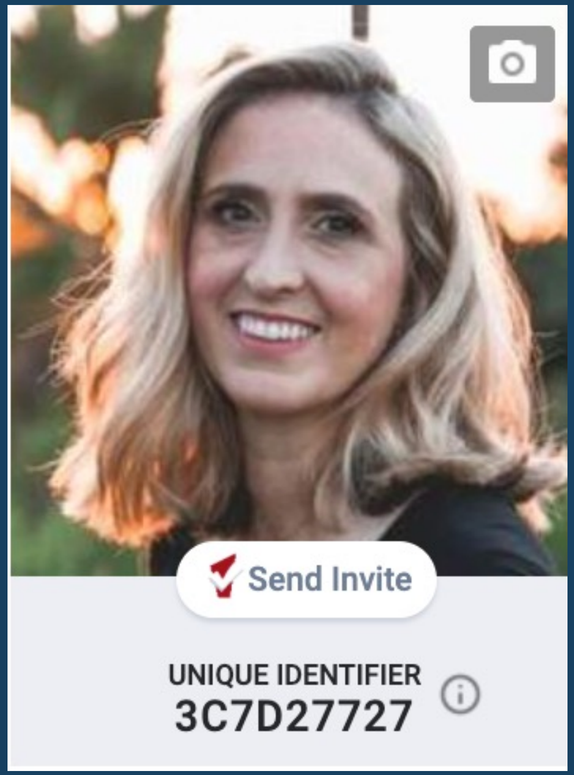
Inviting Clients

Extend Invitations through HMIS
Send invitations with the click of a button through the client's HMIS profile.

Invite All New Clients to Join
Extend invites to all new clients enrolling in your programs.

Invite as Many Existing Clients as Possible
Extend invites to as many existing clients as you can.

Share Your Excitement with Clients
Promote **MyConnect**SV with your clients by introducing it as a new exciting tool.



Utilize Features

Send and Respond to Messages

Check-in with clients and keep all communication organized in your Clarity Inbox.

Send Document, Location, and ROI Requests

Send requests with the click of a button through the client's HMIS profile.

Save Valuable Time

Send mass messages or requests to multiple clients at one time.

Use the Clarity Calendar for Appointments

Schedule your client appointments through the calendar so it is available for client visibility.

Feature Review: Client-Facing Functionality

What Do Clients Need to Participate?

Personal Email Account

Should not be shared in order to protect privacy and confidentiality

Access to a Personal or Shared Device

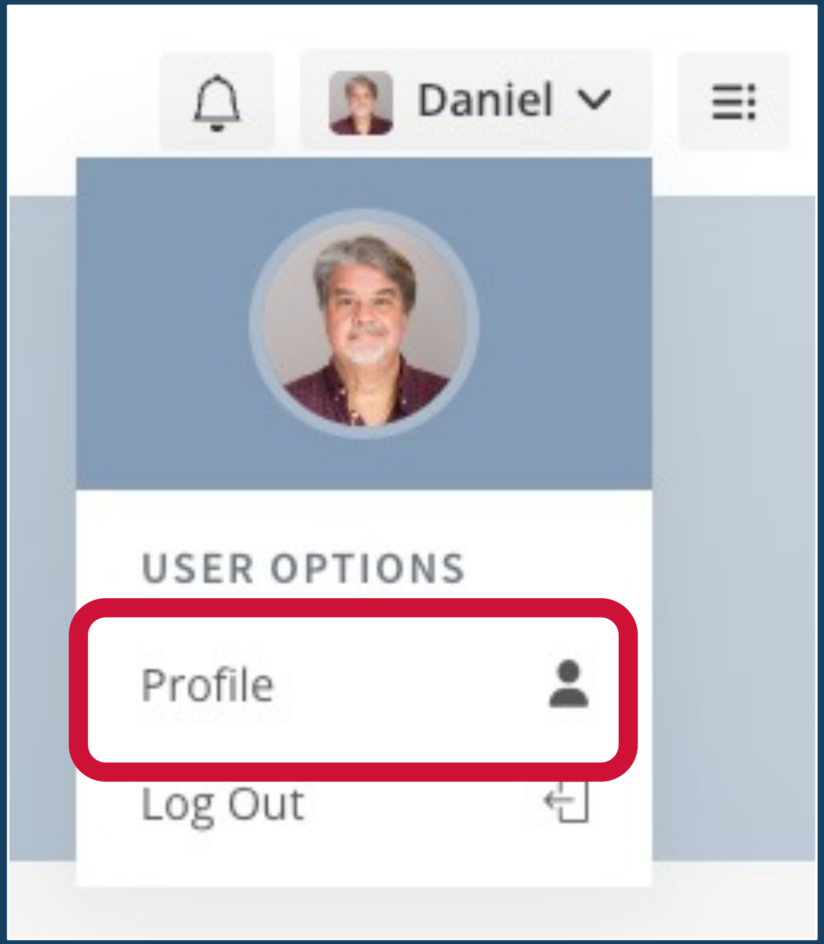
Can be accessed through a laptop, desktop, cell phone, tablet, or other electronic device
Clients can use a shared device to access

Internet Connection

Device must be connected to the internet to access
Can be accessed from any web browser

Invitation from Service Provider

Clients must receive an invitation to join from an HMIS user
Invitations are sent through HMIS



Client Profile

Functionality Overview

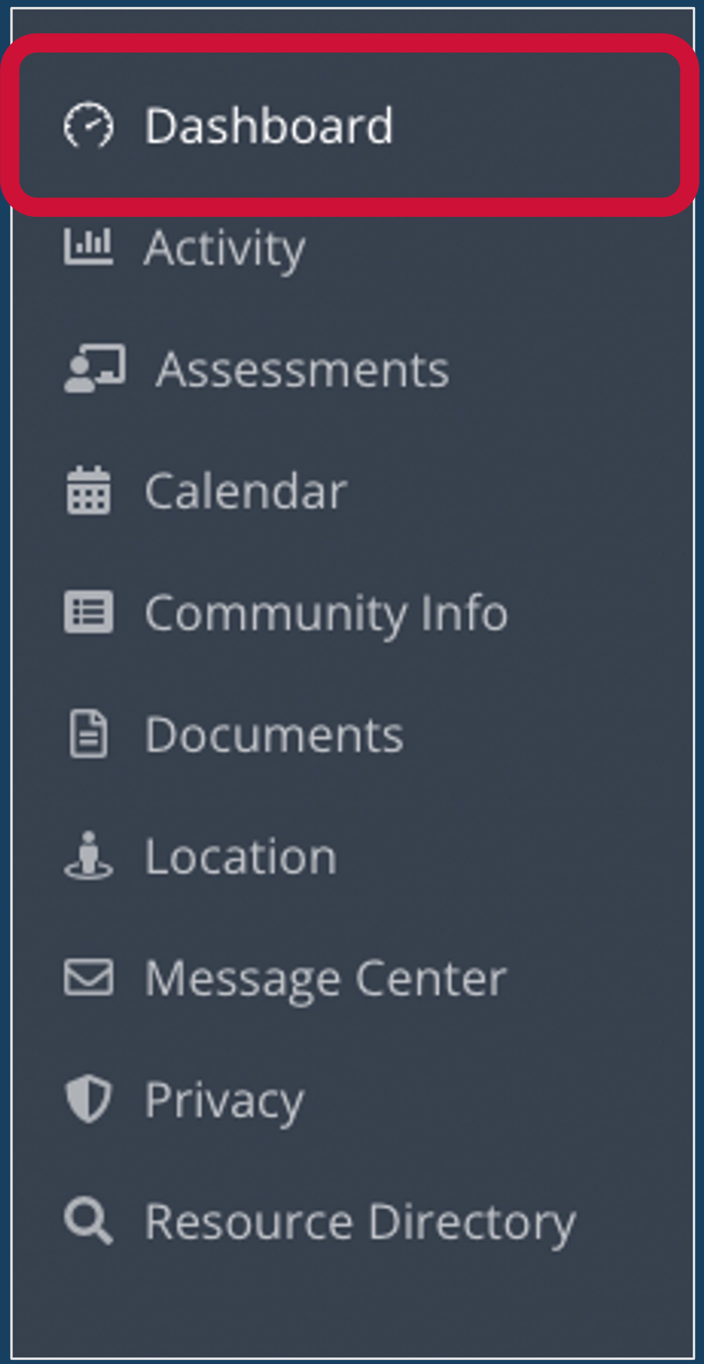
- Personal contact information including name, email, and phone number
- Profile settings & controls for password, notifications, messaging, and site theme
- Client option to disconnect account

Promising Practices

- Review the contact tab to ensure client information contact is up to date
- Send a message to a care team member if contact information isn’t valid

Use Instructions

- Encourage clients to review their personal information for accuracy
- Encourage clients to set their preferences at account creation
- Encourage clients to update their phone number any time a change occurs



Dashboard

Dashboard: Functionality Overview

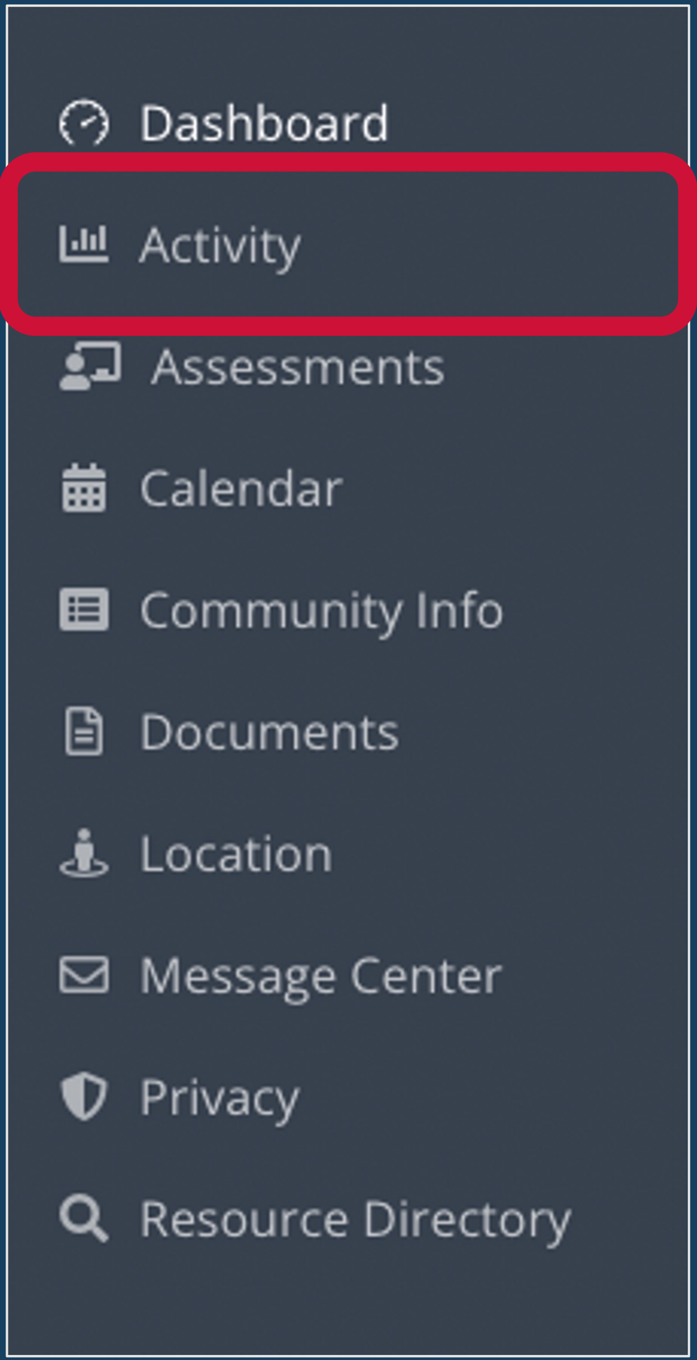
- Default home screen when client logs into **MyConnect**SCC.
- Display includes household members, care team members, Community Queue status, and upcoming appointments.

Dashboard: Promising Practices

- Leave care team member assignment visible
- Keep Care Team assignments current
- Send requests and messages so clients receive notifications at login

Dashboard: Use Instructions

- Encourage clients to review their household members & care team assignments



Activity

Activity: Functionality Overview

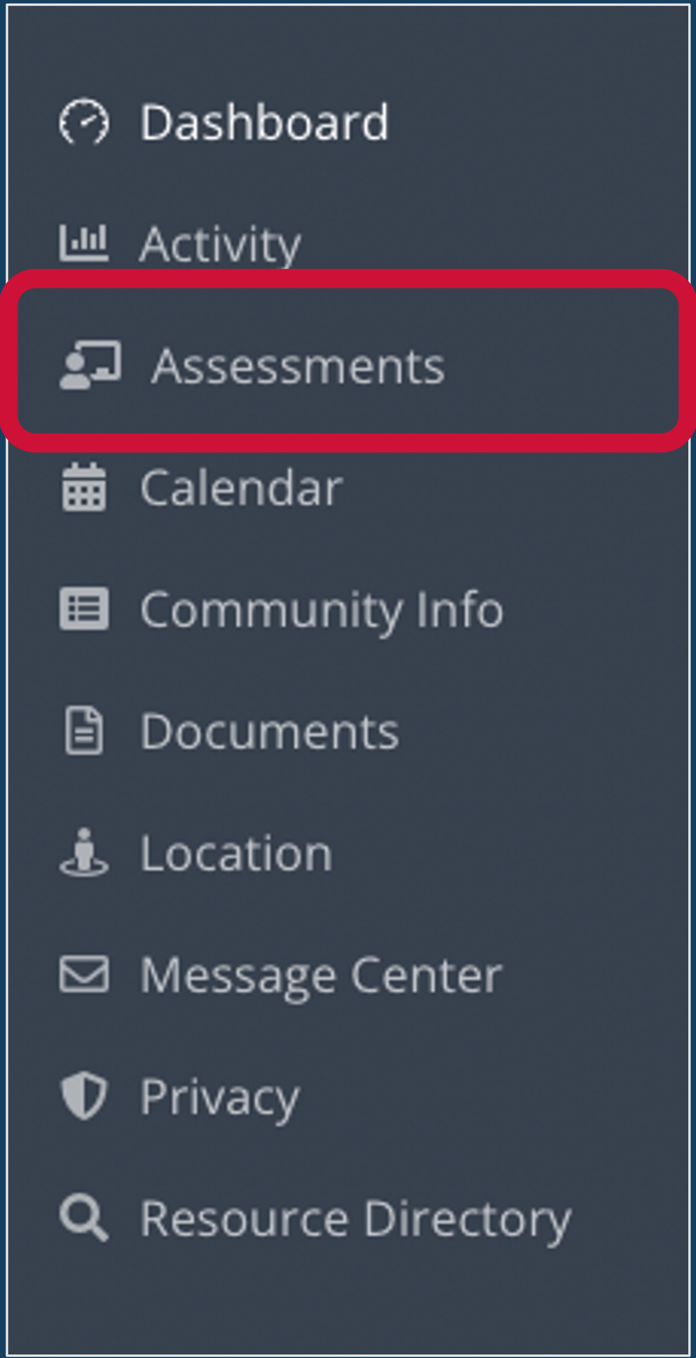
- Chronological listing of project enrollments and participation dates
- Active indicators for any current enrollments
- Household member indicators for group enrollments
- No additional access to program records

Activity: Promising Practices

- Keep your enrollment and exit records current

Activity: Use Instructions

- Encourage clients to review their activity
- Explain to clients that data is available in real time



Assessments

Assessments: Functionality Overview

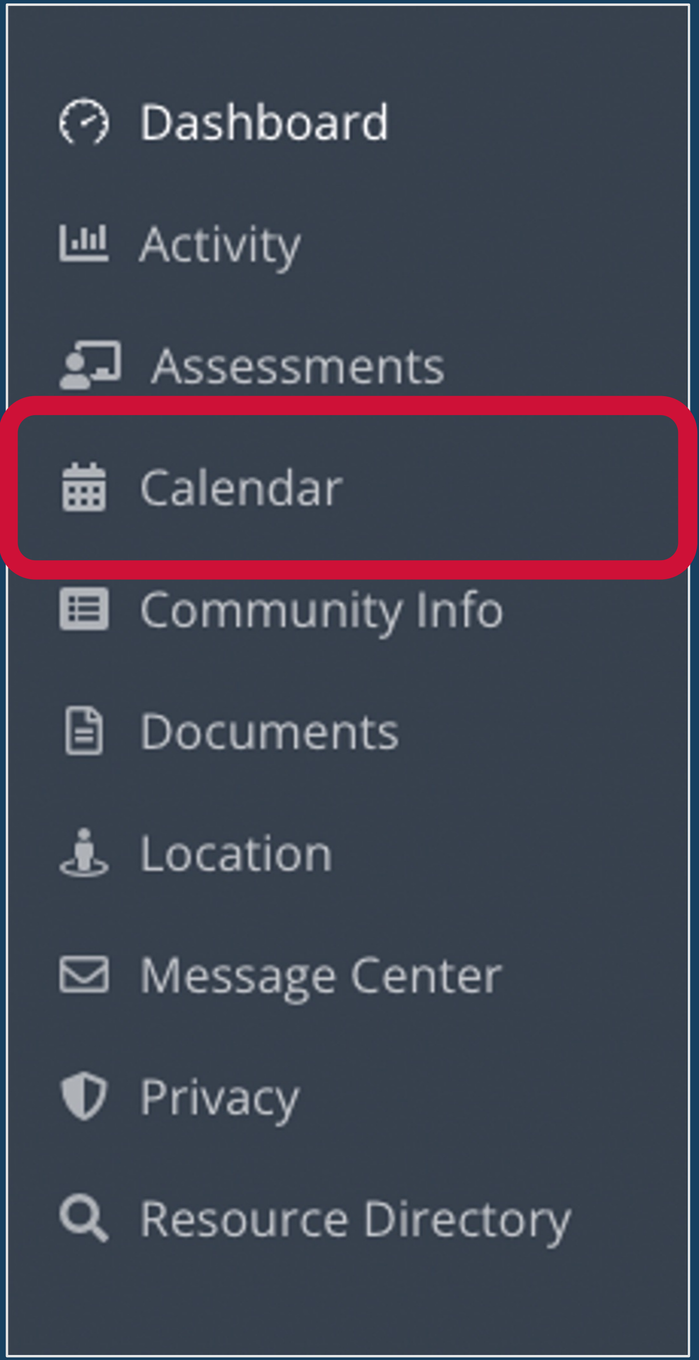
- Ability to complete assessments requested by a provider through HMIS
- Only approved assessments can be requested
- Option to review previously submitted assessments
- No access to scoring or eligibility determinations

Assessments: Promising Practices

- Let clients know you will be sending an assessment and the reason for the assessment
- Offer clients the option to complete the assessment in person
- Issue a program-level assessment if the assessment is needed for program participation

Assessments: Use Instructions

- Explain to clients they will be receiving an assessment before submitting request
- Explain to clients that their responses remain confidential
- Explain to clients they have the right to request an in-person assessment
- Encourage clients to respond to requests as soon as possible



Calendar

Calendar: Functionality Overview

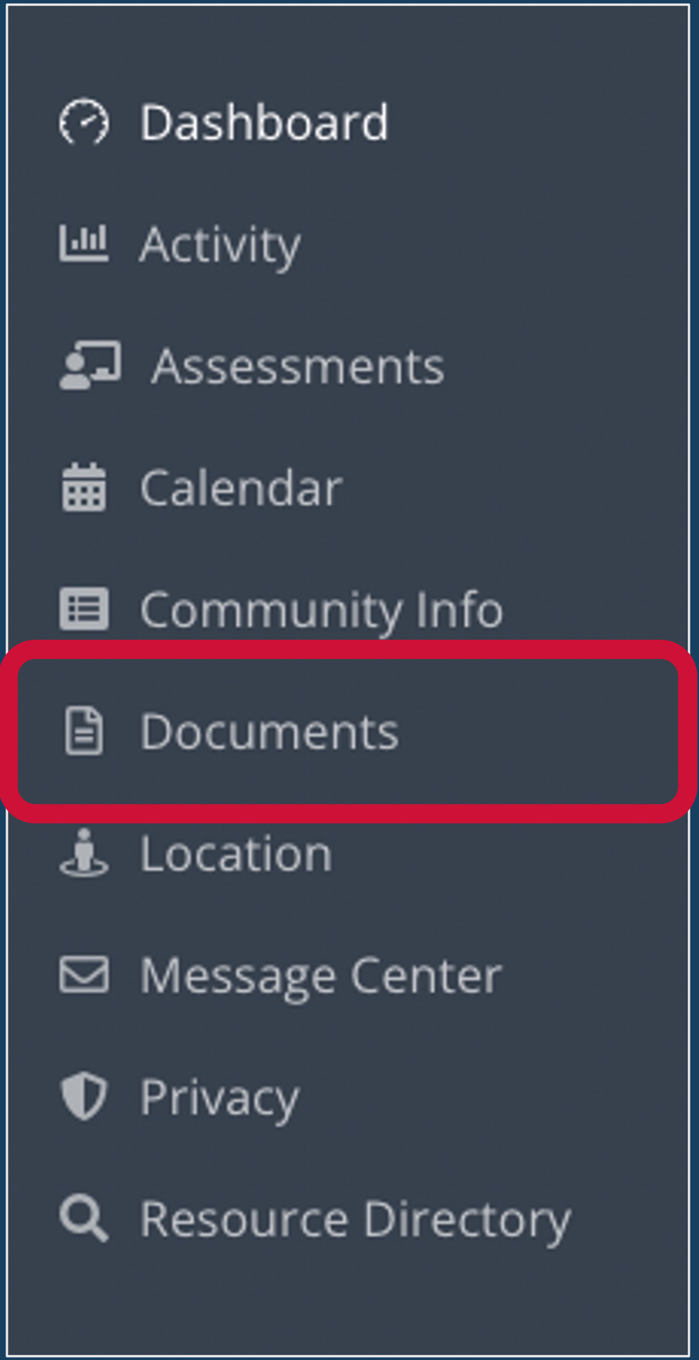
- Allows clients to schedule appointments with care team members based on their posted available time slots
- View all appointments scheduled through Clarity
- Multiple display options available

Calendar: Promising Practices

- Post appointment slots so your clients can easily schedule time to meet with you
- Use Clarity Calendar to show scheduled appointments
- *DO NOT PROVIDE ANY PROTECTED INFORMATION IN APPOINTMENT FIELDS*

Calendar: Use Instructions

- Encourage clients to use the appointment scheduling feature to find a time to meet with you or cancel upcoming appointments
- Encourage clients to review upcoming appointments regularly



Documents

Documents: Functionality Overview

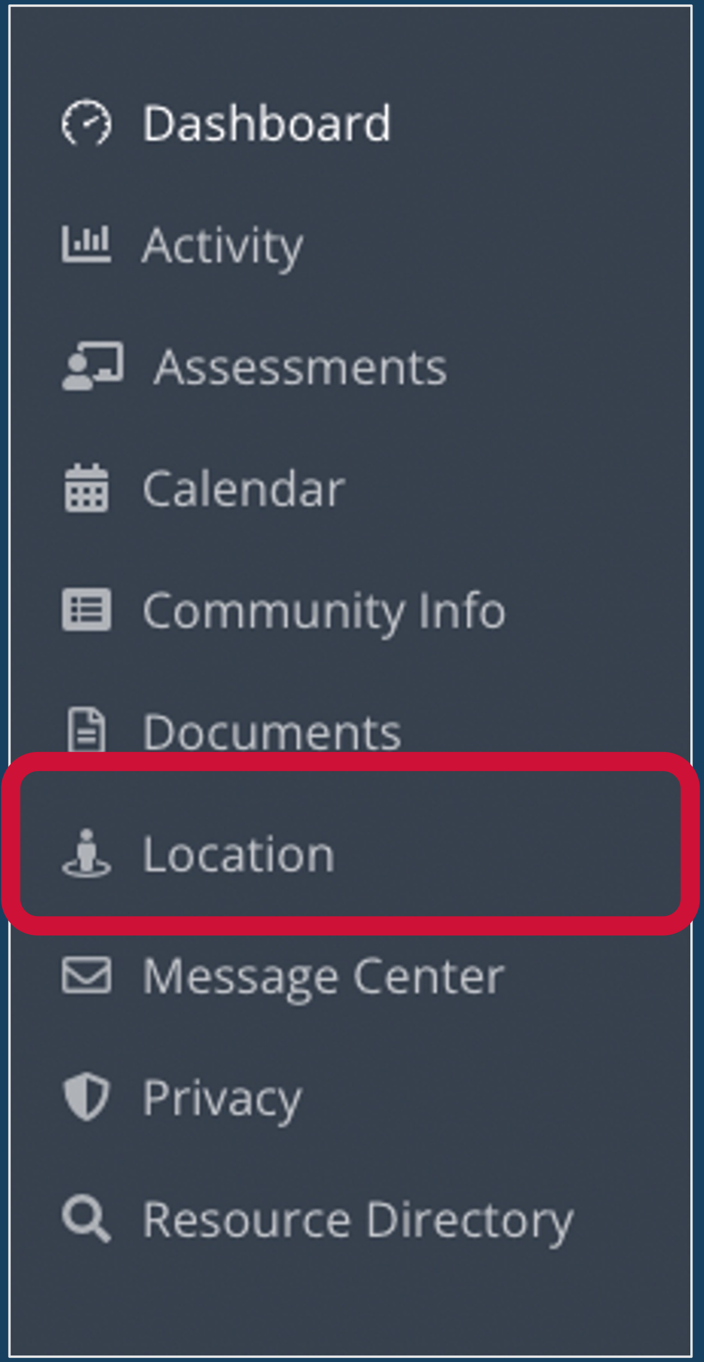
- Allows clients to upload key documents at any time
- Allows providers to request documentation from clients
- Clients can upload pictures, screenshots, or PDFs to submit
- Clients can view all previously submitted documentation
- Clients can submit multiple photos per request

Documents: Promising Practices

- Check client files in HMIS before submitting a document request
- Use to request all required documents

Documents: Use Instructions

- Explain to clients which documents may be useful for them to submit without a request from a provider
- Explain to clients submitted documents are safely and securely stored
- Explain to clients once a document is uploaded, they cannot modify or edit it
- Encourage clients to respond to requests as soon as possible



Location

Location: Functionality Overview

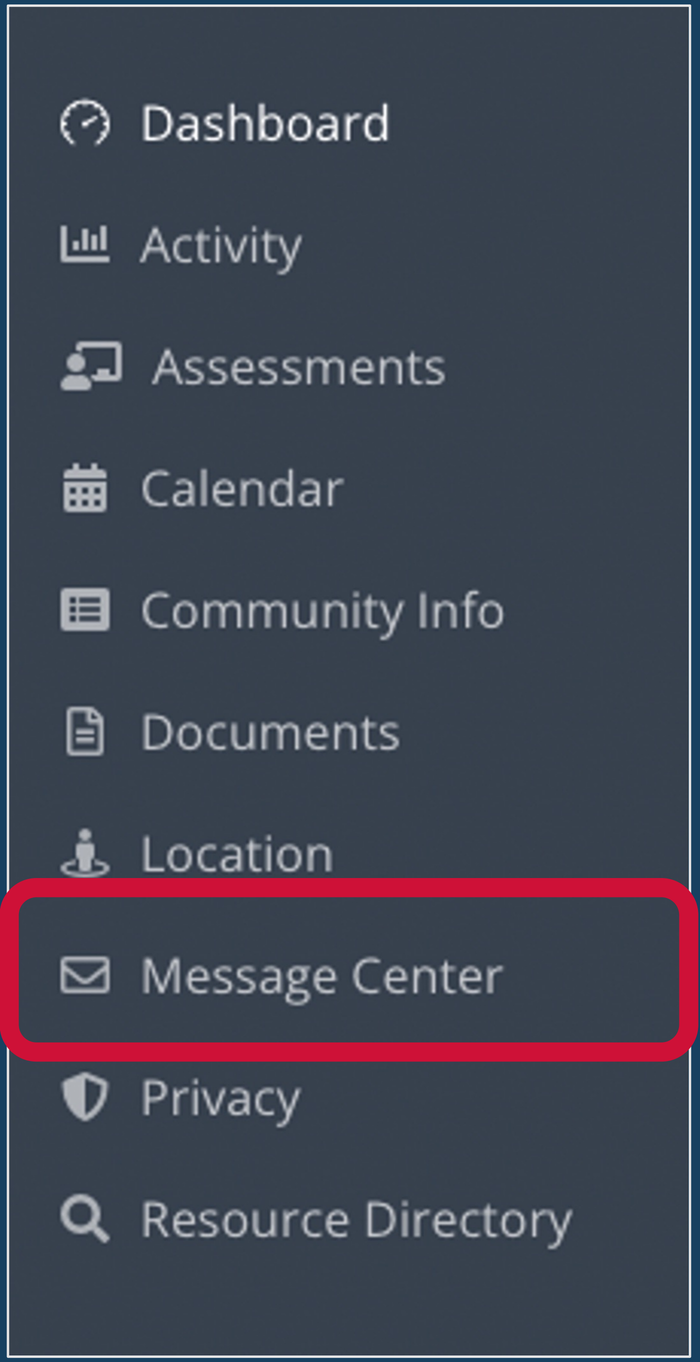
- Allows clients to share their location at any time
- Allows providers to request location updates
- Clients can share an address or GPS location
- Clients can add a location name and notes to provide additional info about the location they're choosing to share

Location: Promising Practices

- Only extend location requests when necessary
- Message clients when you extend the location request explaining why you need to reach them

Location: Use Instructions

- Emphasize to clients that location requests help with providing services and ***will not be used for tracking purposes***
- Encourage clients to add location notes to provide additional context to providers
- Explain to clients that locations can be marked as "Inactive" if they no longer want it to appear in their location history
- Explain to clients that providers may submit location requests
- Encourage clients to respond to requests as soon as possible

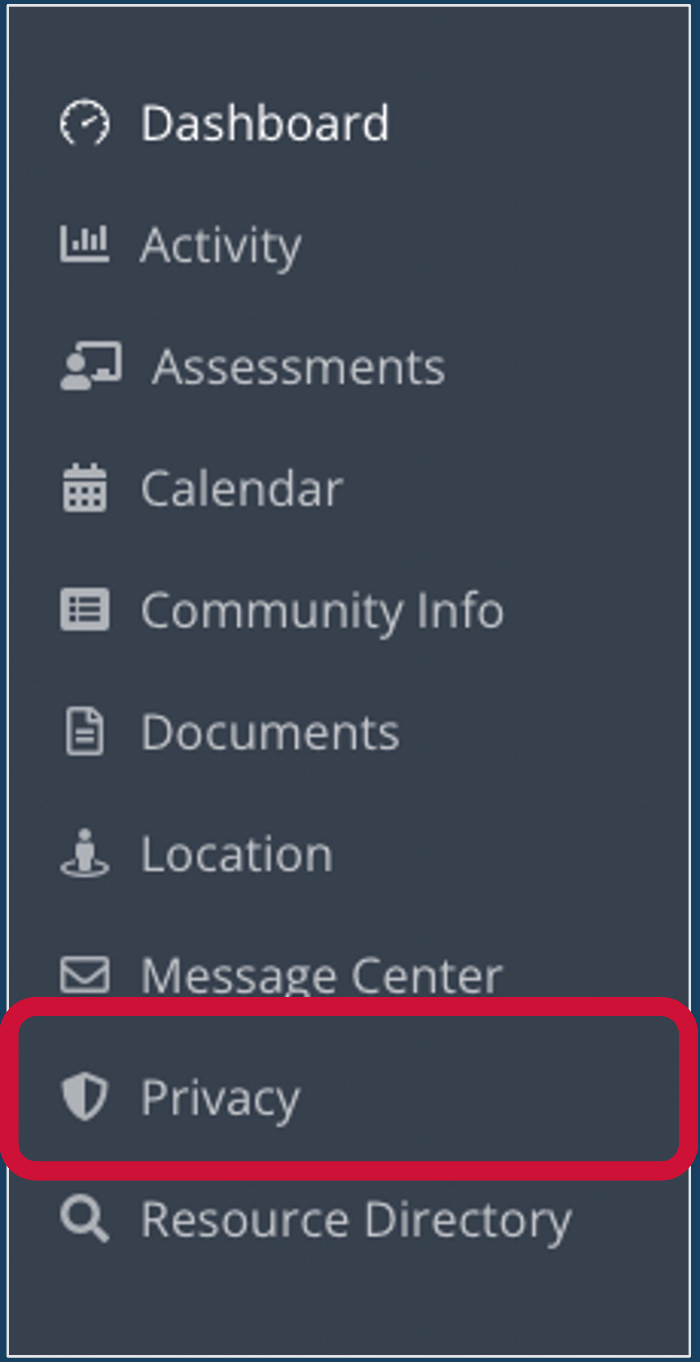


Message Center

Message Center: Functionality Overview
- Allows clients & care team members to send and receive messages
- Stores previous messages and responses
- Includes options for clients and providers to turn off messaging

Message Center: Promising Practices
- Use message center to manage all client communication
- Respond to client messages as soon as possible

Message Center: Use Instructions
- Explain to clients they can send and receive messages from care team members
- Explain to clients they can turn off messaging if desired
- Encourage clients to respond to messages as soon as possible
- Encourage clients to use the Message Center to request updates or information



Privacy

Privacy: Functionality Overview

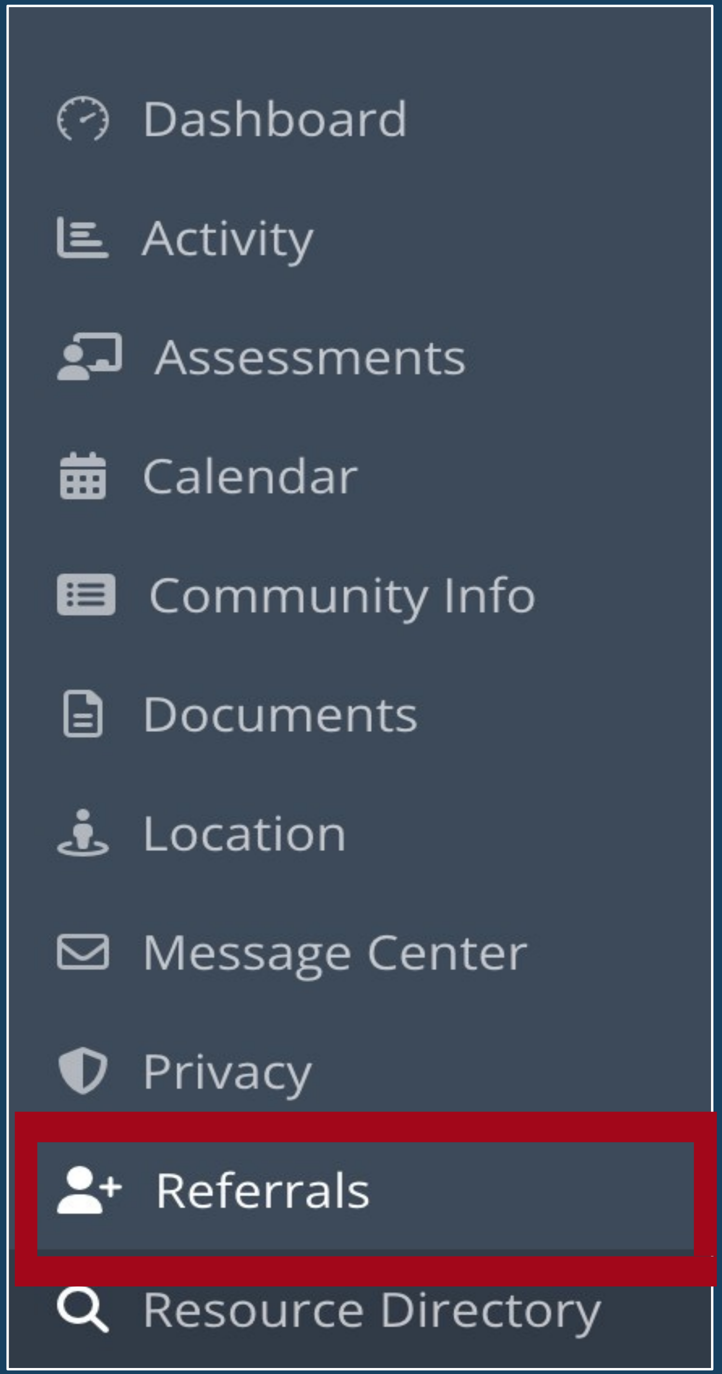
- Allows clients to electronically sign a new Release of Information
- Prevents providers from sending multiple requests to a client
- Submitted ROIs are stored within the client profile

Privacy: Promising Practices

- Review ROIs for upcoming expiration during invitation
- Extend request for new ROI two weeks before expiration
- Message clients to explain the importance of the request

Privacy: Use Instructions

- Explain to clients the importance of ROIs for coordinating services
- Explain to clients that if their ROI expires, they will receive a notification and can sign a new ROI without waiting for a request
- Explain to clients that they cannot revise or revoke an ROI within **MyConnect**SV, but can send a message to request changes
- Encourage clients to respond to ROI requests as soon as possible



Referrals

Referrals: Functionality Overview

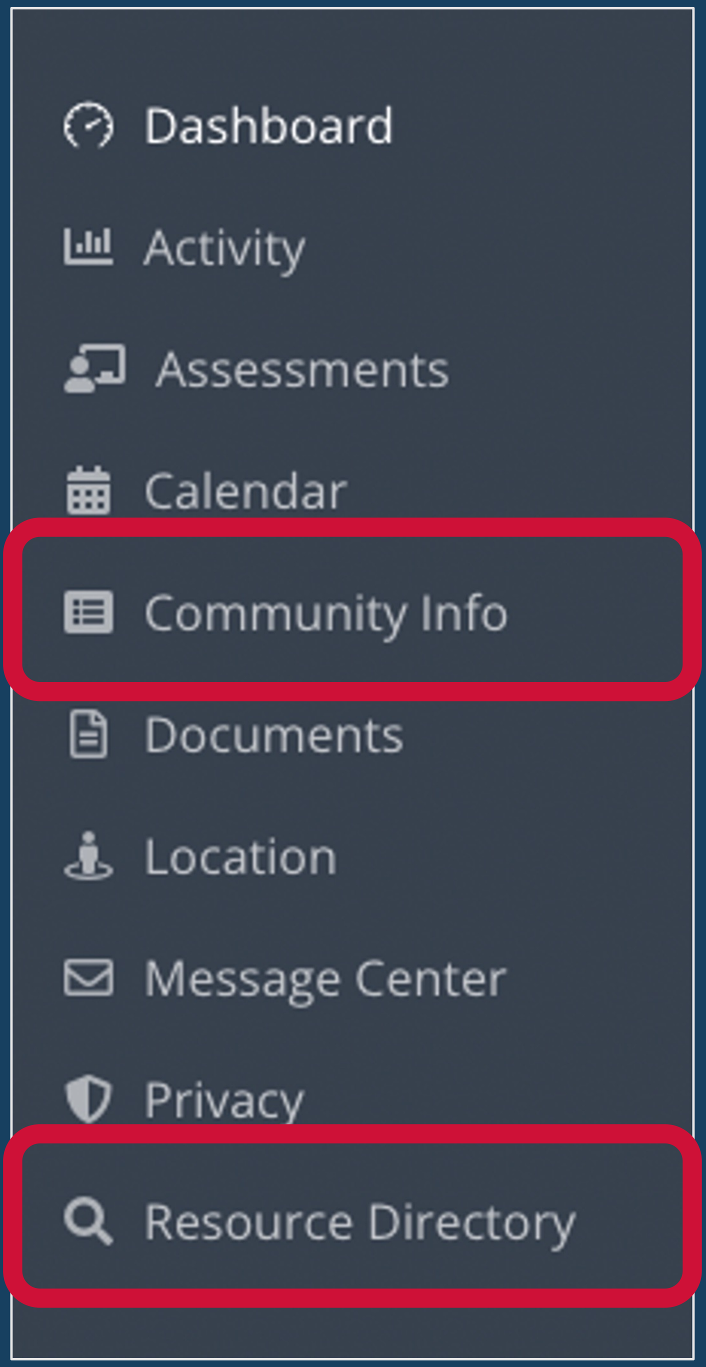
- Provides participants with a listing of their current and past referrals in HMIS
- Includes the referral date, agency name, program name, current referral status, and the date when the referral status was most recently updated.

Referrals: Promising Practices

- If a participant contacts you because they see they have a Pending program referral, please help them connect with a staff member at the referred-to agency as quickly as possible

Referrals: Use Instructions

- Encourage clients to review their current and past referrals regularly and reach out to you or another provider right away if they have a pending referral
- Encourage clients to keep their contact info in their MyConnectSV profile up-to-date so providers can contact them about future referrals
- Explain to clients that data is available in real time



Resource Directory & Community Info

Resource Directory & Community Info: Functionality Overview

- Allows clients to get up-to-date local information
- View community info articles and links and filter by category
- View and filter resources by agency, category, and location
- Use a map with current location to identify nearby resources
- Providers can also view and search the Resource Directory in Clarity to print resources for clients or help them to find the same resources in MyConnectSV

Resource Directory & Community Info: Promising Practices

- Encourage clients to utilize the Community Info and Resource Directory to learn more about local resources and information

Resource Directory & Community Info: Use Instructions

- Explain to clients that resources and articles will be updated regularly and can be reviewed often to stay up-to-date
- Explain to clients that they can check the “Last Updated” date for each resource or article to identify new and updated information

Client Functionality
Demo

Provider Functionality & Workflows

MyConnectSV Invitations

Verify Eligibility

- 18 years of age or older
- Consent to participate
- Active Release of Information (ROI)

Verify Identity

- Confirm Full Name
- Confirm two identifying pieces of information:
  - DOB
  - Phone Number
  - Address
  - SSN
  - Recent Service History
  - Photo
  - HMIS ID Number

Send Invitation

- Send Invite through client HMIS profile
- Invitations must be responded to within 14 days
- Clients will receive reminders if their invitation is going to expire
- Manually resend invitation at any time

Points to Emphasize with Clients

Designed to Increase Access
New tools designed to give more control!

Developed in Collaboration
Developed in collaboration with individuals with lived experience of homelessness.

Secure Connection
Developed with the security of individuals and their personal information in mind.

Restrictions

DO NOT use **MyConnect**SV to share the following information:

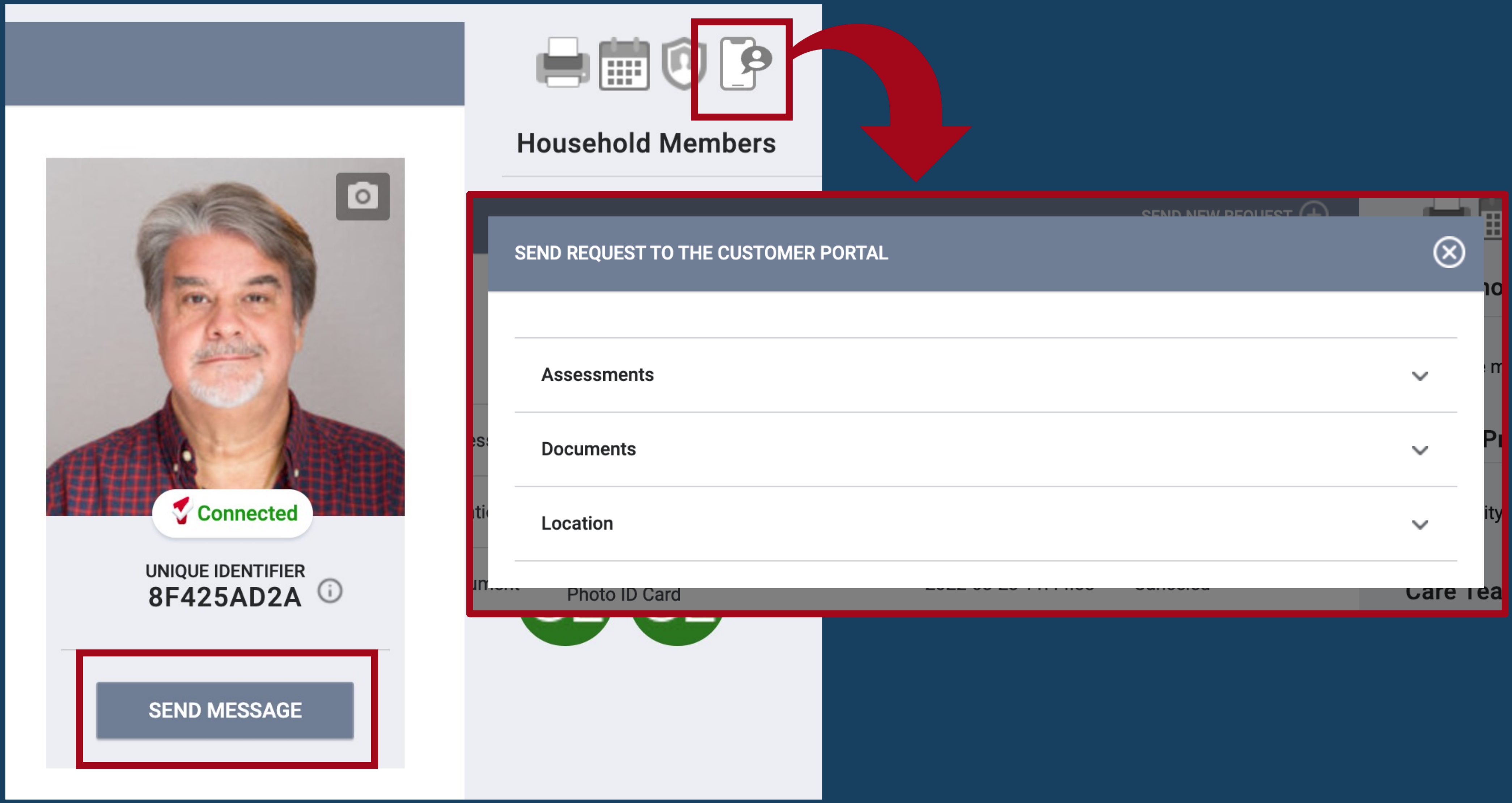
- 🚫 Health Care Information or Health Status (HIPPA)
- 🚫 Alcohol & Drug Abuse Treatment Information
- 🚫 Domestic Violence Status or Program Information
- 🚫 Citizen, Residency, or Immigration Status
- 🚫 Financial Accounts or Credit Scores
- 🚫 Education Records

Invitation

Demo

Sending Requests and Messages

Send **individual** requests or messages to a client's **MyConnectSV** account through their Clarity profile



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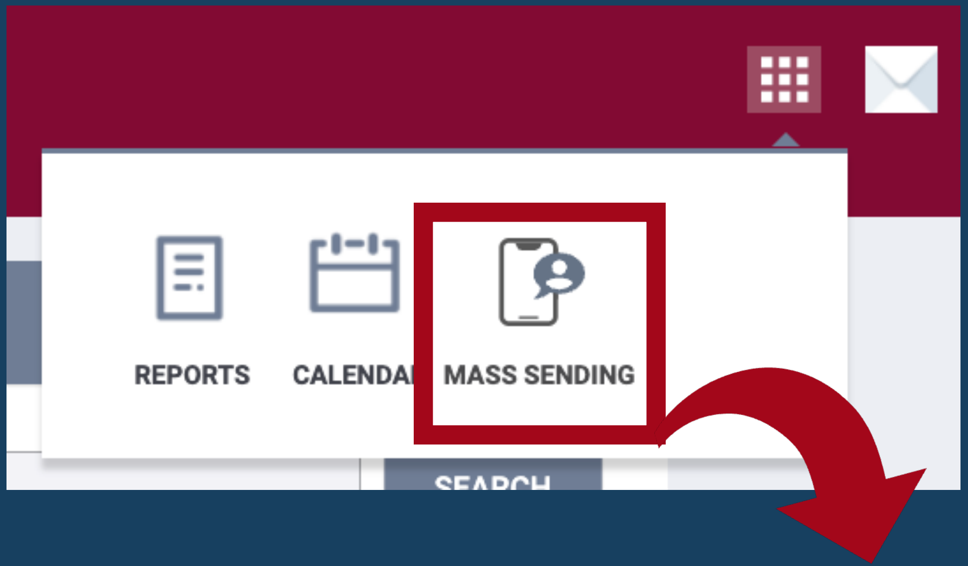
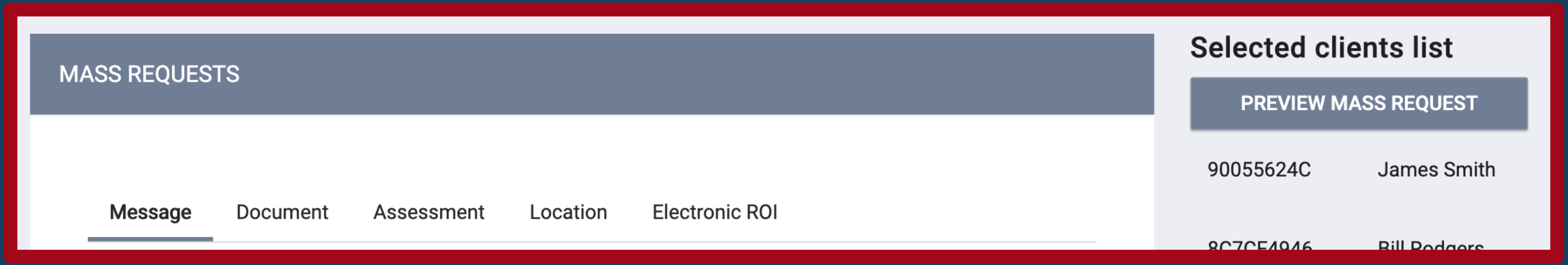
Sending Requests and Messages

Send requests or messages to **multiple** clients at one time using the **Mass Sending** functionality





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Sending Requests

Demo

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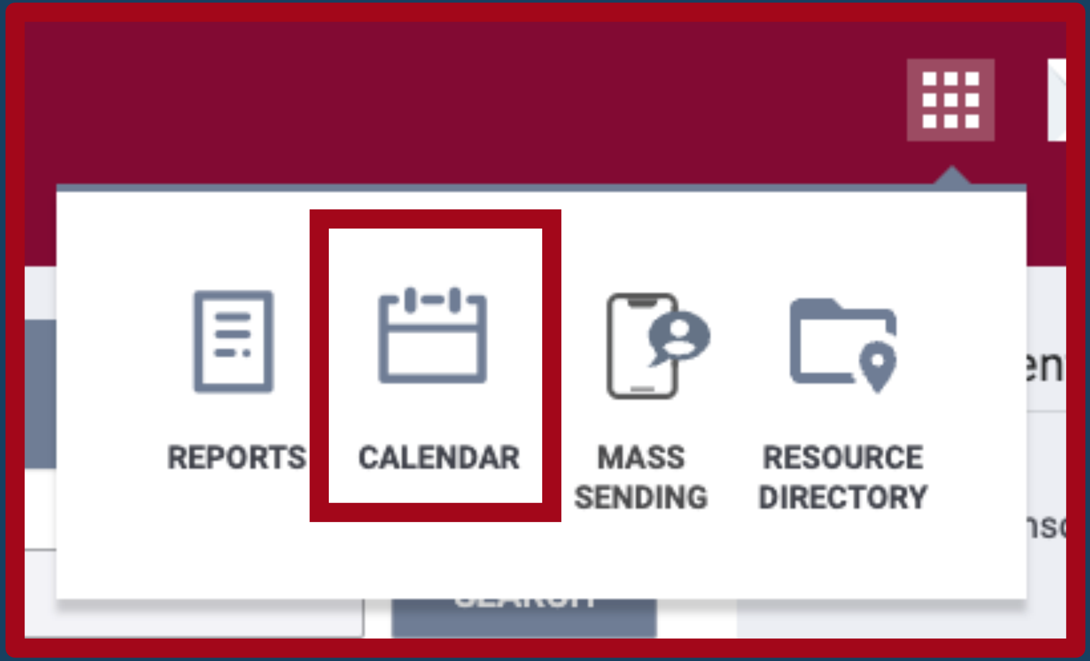
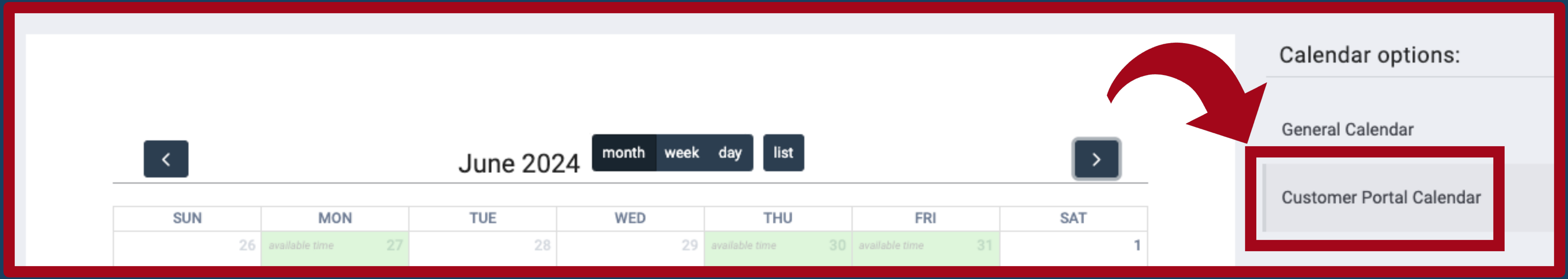
Posting Appointment Slots

Post times you're available to meet as **appointment slots** so that participants can schedule time with you directly through MyConnectSV





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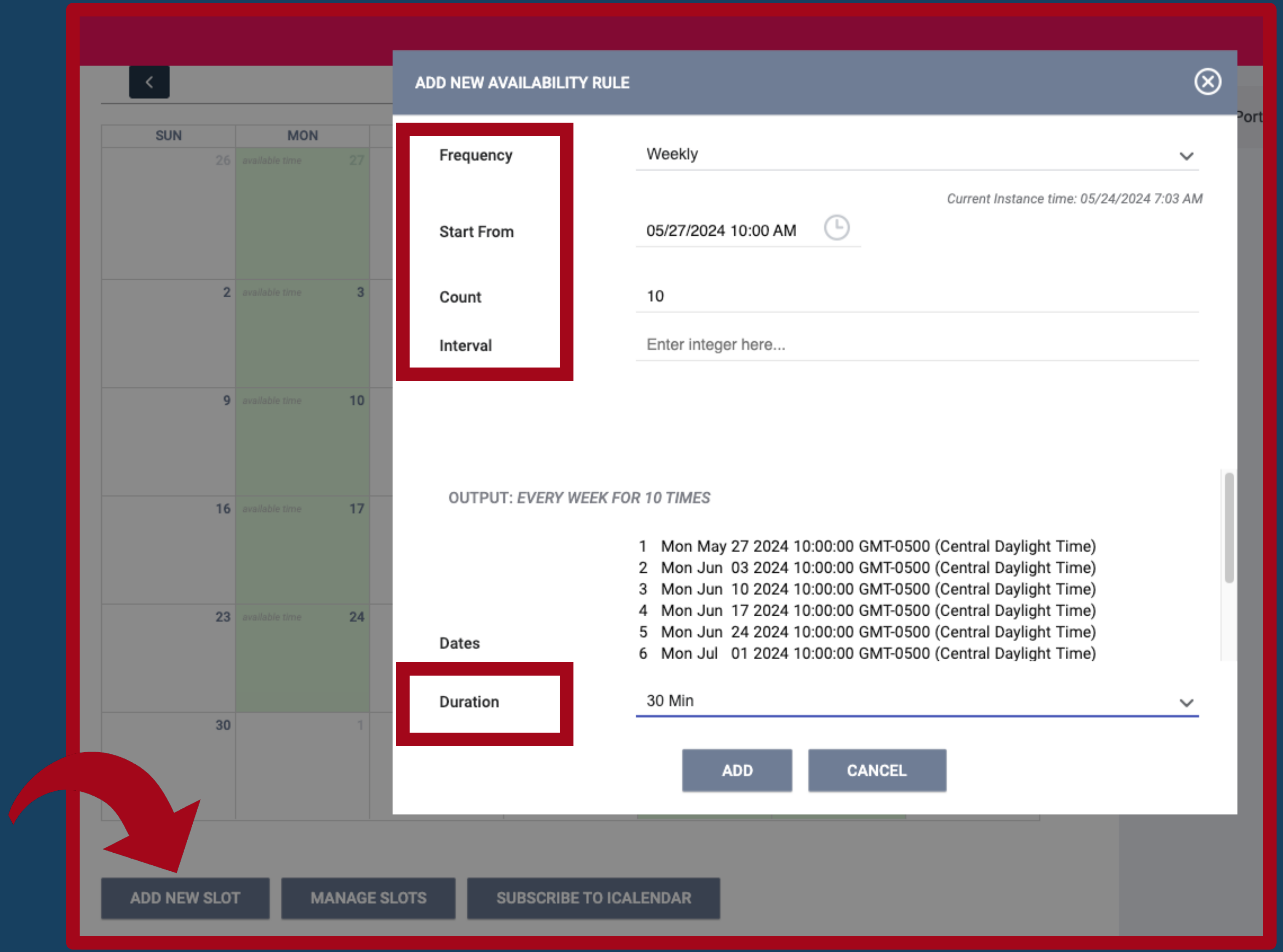
Posting Appointment Slots

Click “Add New Slot” and choose:

- Frequency
- Starting date and time
- End date *or* count of slots to schedule
- Interval *(optional)*
- Duration



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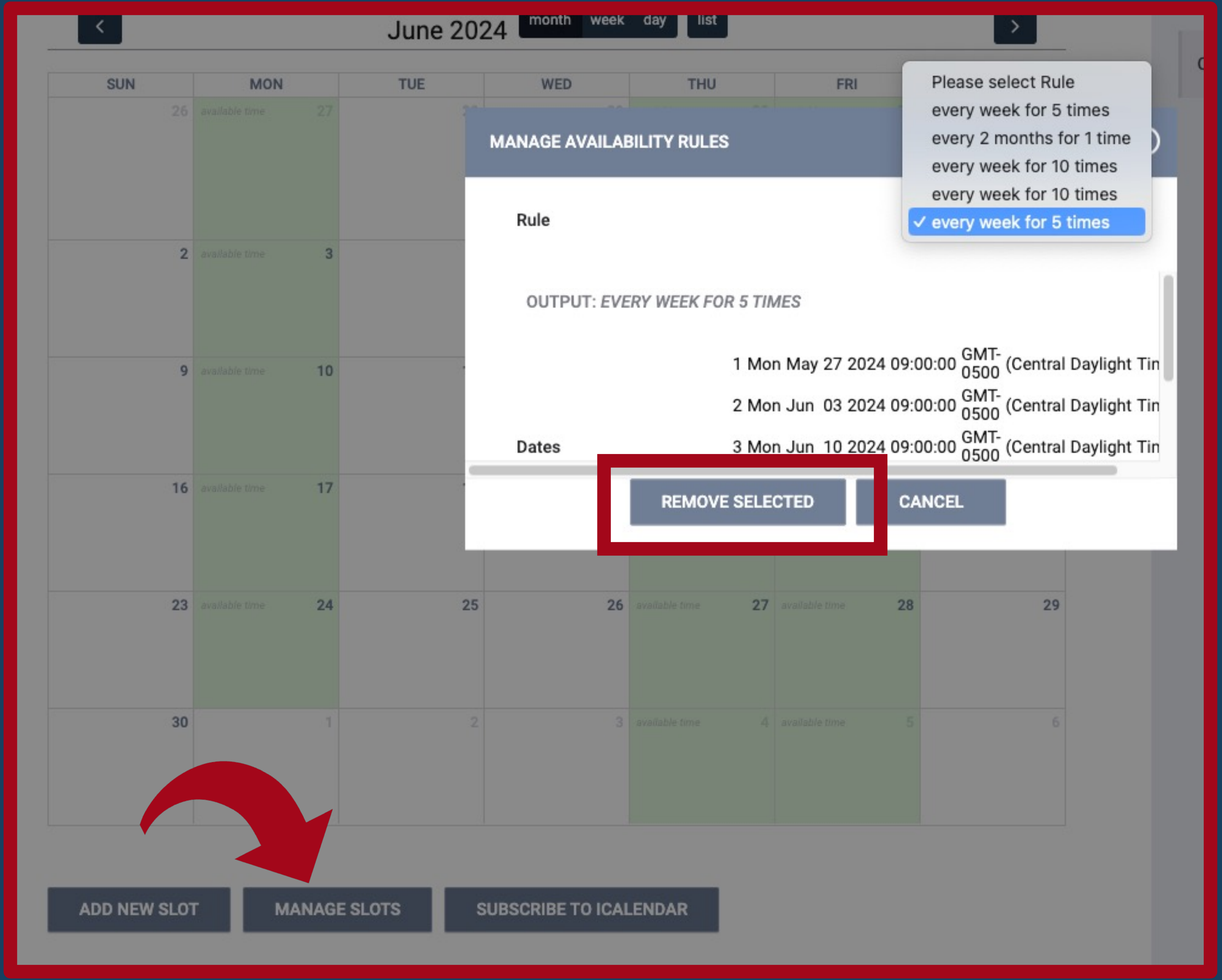
Posting Appointment Slots

Click “Manage Slots” to remove an existing recurring schedule of appointment slots



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Posting Appointment Slots

Demo

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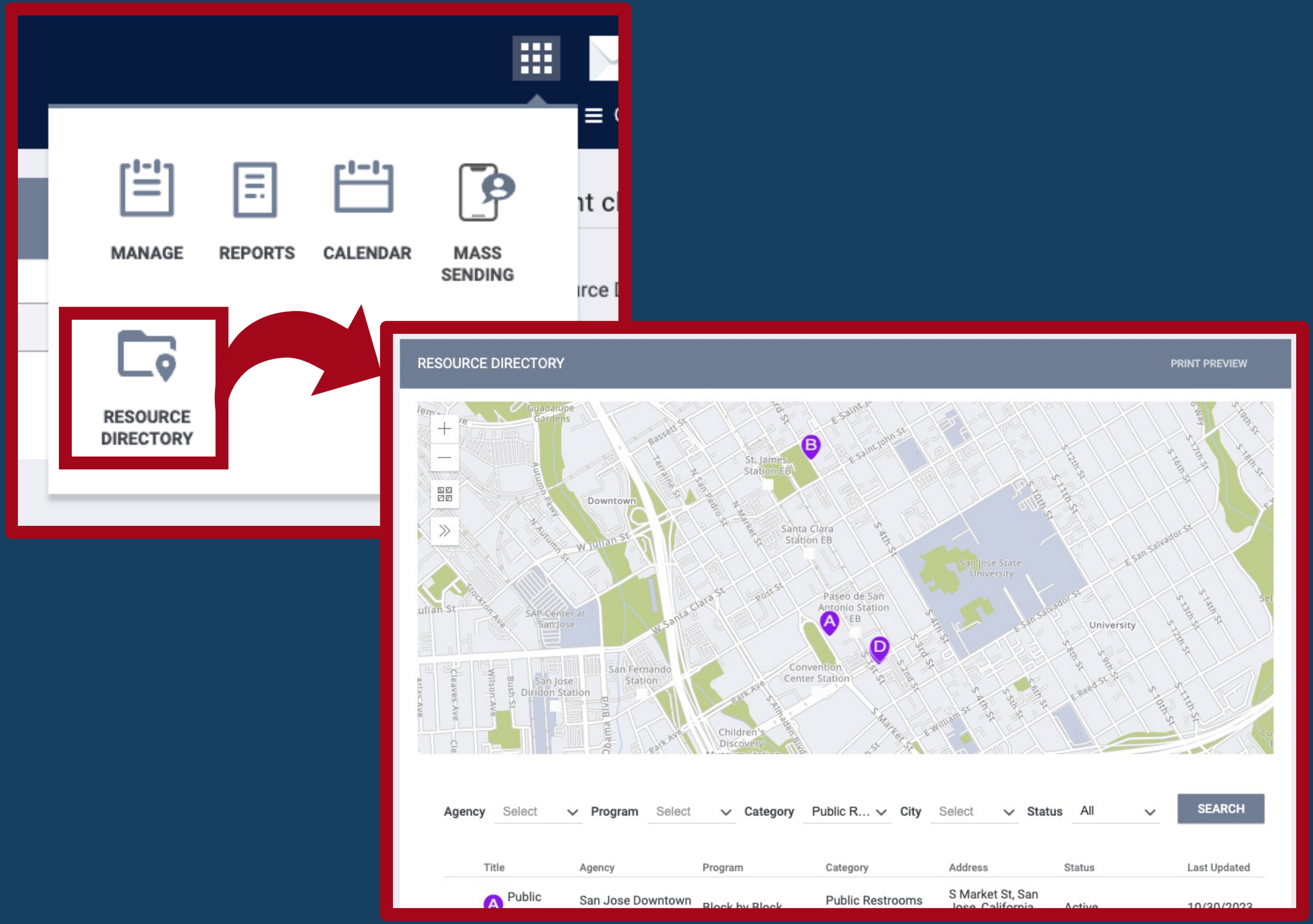
Resource Directory

View and filter the same MyConnectSV resources within Clarity and print them to share with participants



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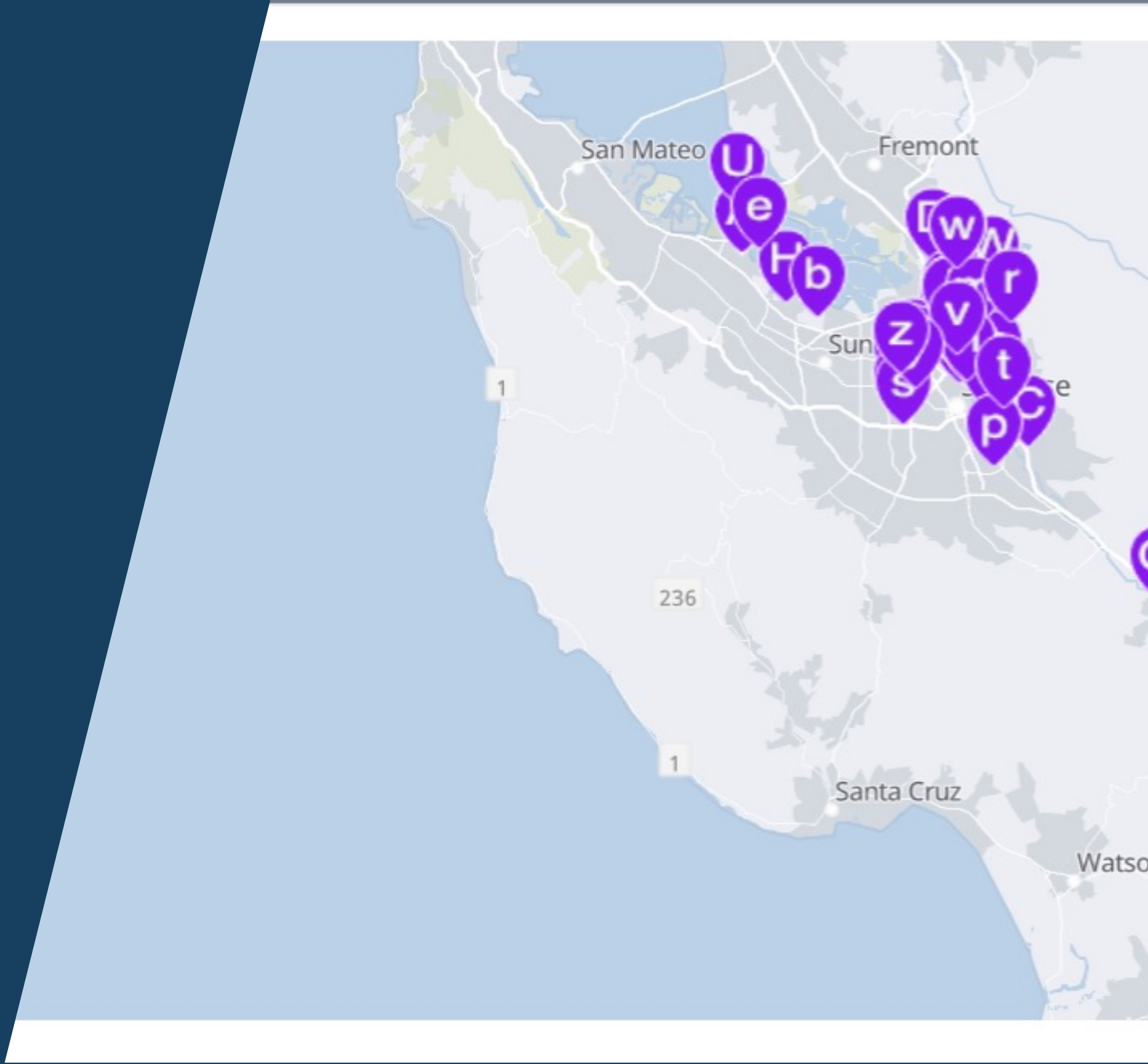
Resource Directory
Demo



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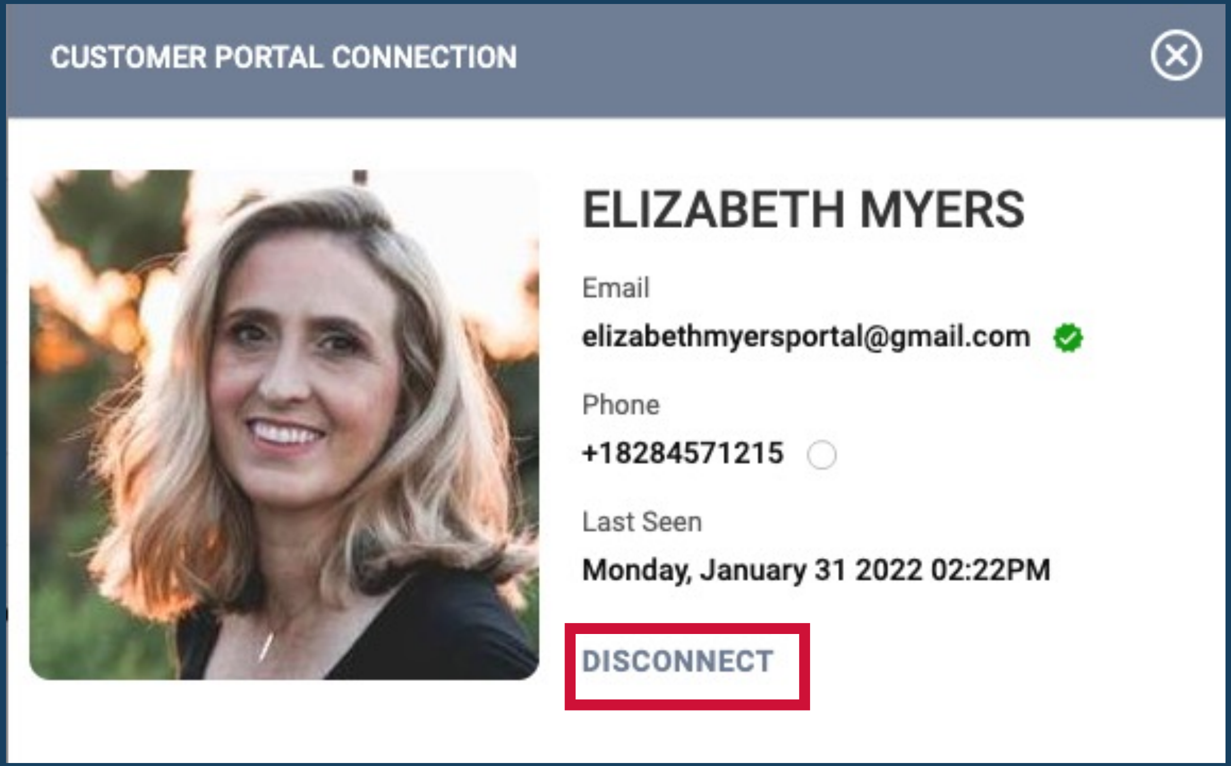
Account Disconnection

Clients or their providers should disconnect an account immediately if any of the following occur:

- Client lost access to personal email
- Client's personal email is compromised
- Client has changed their personal email address
- Account is compromised

*If a client has only forgotten their **MyConnect**SV password and their email has **not** been compromised, they can use the "Forget Password" button on the login page to receive a link to reset their password.*



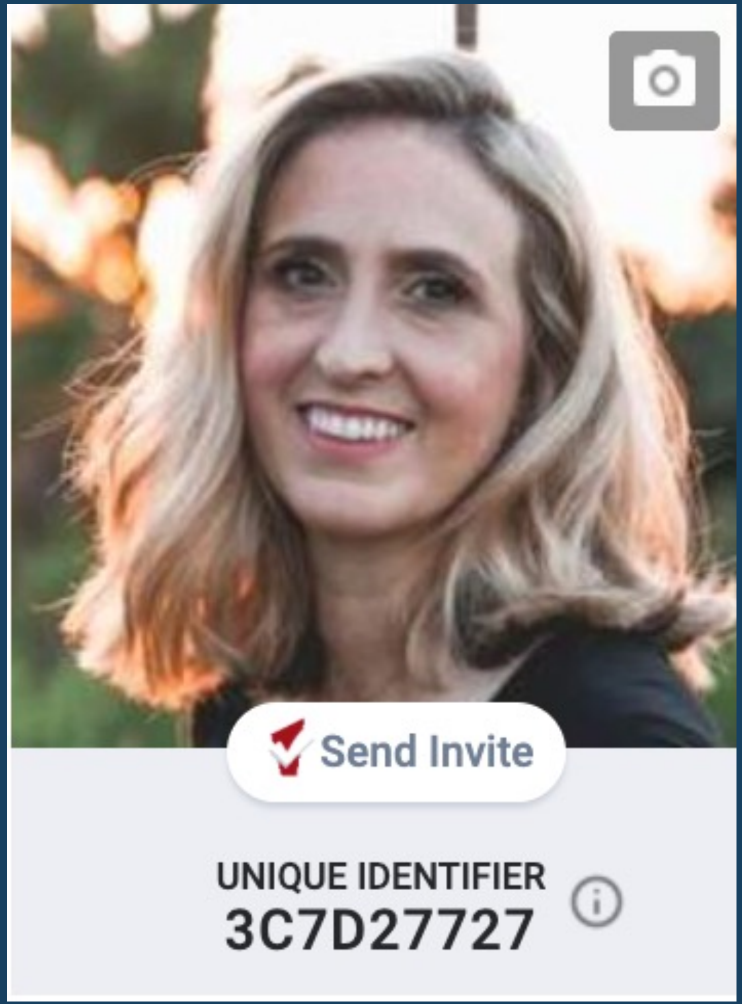
*Account disconnection suspends access to a client's personal information within **MyConnect**SV.*

Account Reconnection

If an account has been disconnected due to a client losing access to their email account:

- Encourage client to create a new free email address
- Send an invite to a client’s new email address using the same method used to invite the client for the first time

All information is saved, and clients will have access to their information once the account is reconnected to the new address.



Account Disconnection

Demo

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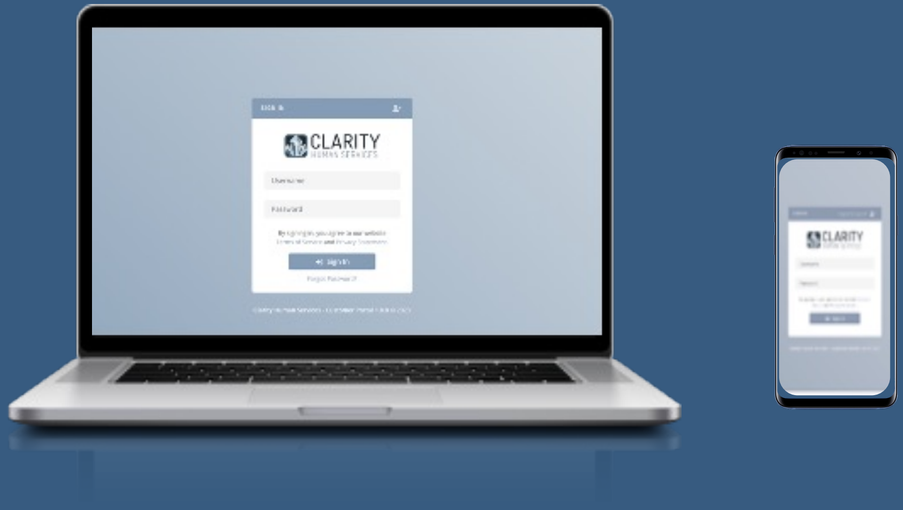
Support Process & Resources



Client Support Process

MyConnectSV Introduction

- Provide client with promotional flyer resources
- Share benefits of utilizing **MyConnectSV**

Account Creation

- Confirm eligibility & Consent
- Direct client to resources
- Send invitation
- Offer assistance if needed

Account Utilization

- Direct client to training resources
- Explain how you intend to use **MyConnectSV**
- Encourage clients to explore **MyConnectSV**
- Connect clients with the Peer Support team for additional assistance

Client Resources

MyConnectSV Promotional Flyer

Promotional flyer with FAQs and links to more information can be requested through Destination: Home.

MyConnectSV Client Guide

Comprehensive guide including instructions and recommended uses for features.

Instructional Videos

Access to multiple short instructional videos that cover the account creation process and feature review.

Provider Resources

Provider Manual

Comprehensive guide including provider and client instructions, recommendations, and promising practices available at scc.bitfocus.com

Access to Training Session

Access to training sessions through training.bitfocus.com

Office Hours

Attend regular Santa Clara County HMIS Clarity Office hours for further assistance or to ask questions (calendar available at https://scc.bitfocus.com/events)

Next Steps

After passing the quiz following this video, email

sccsupport@bitfocus.com

to request an update to your access role in Clarity.

You'll then get access to begin inviting and utilizing MyConnectSV with your participants!