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

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

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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 sccadmin@Bitfocus.com before or by deadline

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Quarterly Security Checklist Report

Running the Report in the Data Analysis Tab

A) Login into HMIS

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

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

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

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"

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

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

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

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

☐ Quarter 1

☐ Quarter 2

☐ Quarter 3

☐ Quarter 4