

June 2024 TA/Agency Lead Minutes



MEETING OBJECTIVES

UPDATES

- CoC Updates
- UPIFT Updates
- UPLIFT User Access
- HMIS Newsletter

IN THE KNOW

- HIC/PIT Submission – Thank You
- Feature Updates – April & June 2024
- CHQ 180 Day Change
- Upcoming DEW – July 23rd

MEMOS

- Recently Assessed & Not on CHQ
- Do's & Don'ts of the VI-SPDAT
- Using the Help Desk
- Next Month's Meeting

UPDATES

CoC Updates

NOFO application scoring tools have been approved for both renewal and new projects

Thank you to all who gave thoughtful feedback on how these could be improved!

- Our next CoC Membership meeting will be in August (TBD)
- There will be a focus on sharing updated Quality Assurance Standards

Thank you to the agencies involved in beta-testing the new assessment
(in the works!)

HomeFirst, BWC, Abode, SCC Re-Entry & YWCA

This will help us fine-tune assessment questions to ensure they are equitable, person-centered, and accessible!

Upcoming Events - June 2024

| JUNE 2024 | | | | |
|--|--|--|--|-----|
| MON | TUES | WED | THURS | FRI |
| 3 | 4 | 5 | 6 <small>June 2024 Client Office Hours HHS National Address System Call Management Training</small> | 7 |
| 10 <small>June 2024 Client Office Hours</small> | 11 <small>June 2024 Client Office Hours</small> | 12 <small>U.S. House of Representatives National Meeting</small> | 13 | 14 |
| 17 | 18 | 19 <small>JUN 19 JUN 20 Diversified Holiday SCC OSR & SF Closed</small> | 20 <small>June 2024 Client Office Hours</small> | 21 |
| 24 <small>June 2024 Client Office Hours</small> | 25 | 26 <small>June 2024 Client Office Hours</small> | 27 <small>June 2024 Client Office Hours Closed Meeting Center June 27th 2024 Public Service Day 10:00 AM - 12:00 PM</small> | 28 |

UPLIFT Updates

REMINDERS FOR REQUESTING PASSES

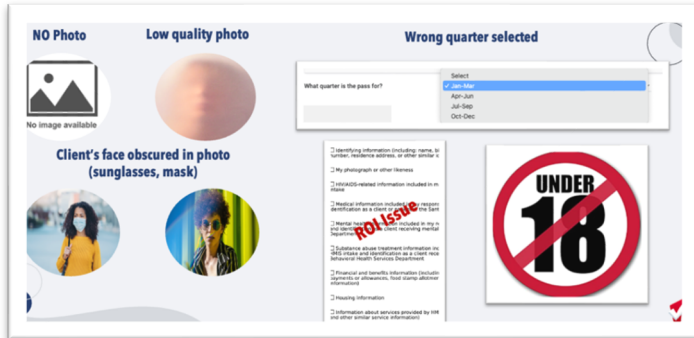
- MUST be dated 6/14/23 or onward
- MUST be for Jul-Sep quarter
- Request either a "Sticker" OR "Badge and Sticker" when requesting a pass for a client the 1st time
- ONLY request a "Badge and Sticker" if:
 - Enrolling a new client
 - A continuing client has lost their badge
- Clients should be reusing their UPLIFT badges each quarter
- Please check client HMIS profile to see if another agency has already requested one; duplicate requests need to be resolved by agency staff before



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it can be processed

ERROR Reminders



- Allocation Surveys **Due 6/12**
- Final Allocations will be sent **6/13**
- Email UPLIFT if the Program Coordinator at your Agency Changed UPLIFT@hhs.sccgov.org
- UPLIFT is **unable to increase** total amount of passes
- Total amount of Stickers available for FY 2025 Q1 will remain at **2500**
- Conversations with our partners at VTA are still ongoing!

To be added to the UPLIFT mailing list, please

email UPLIFT@hhs.sccgov.org

UPLIFT User Access



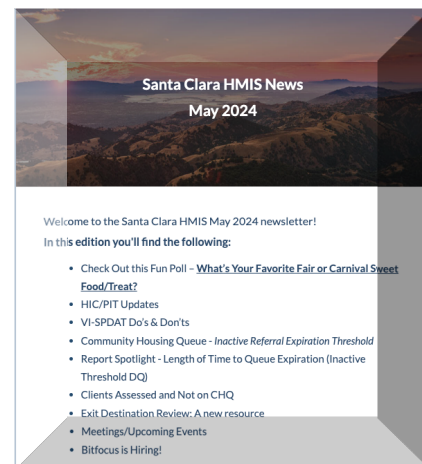
UPLIFT Program Coordinator responsibilities

- Inform your End Users if your Agency does/does not provide UPLIFT passes
- Inform them of your internal workflow for requesting UPLIFT Access

End User Responsibility

- Check-in with your UPC for workflow
- [Complete the 30-Minute Training](#)
- Complete the Knowledge Test & score 100% to be considered passing (will follow training video)
- After training completion please contact the Help Desk – your UPC will be informed, and if approved access granted

HMIS Newsletter



IN THE KNOW

HIC/PIT Submission

Thank You!

HIC/PIT was submitted by deadline Tuesday, May 10th!

Thank you for all your support and data quality clean-up



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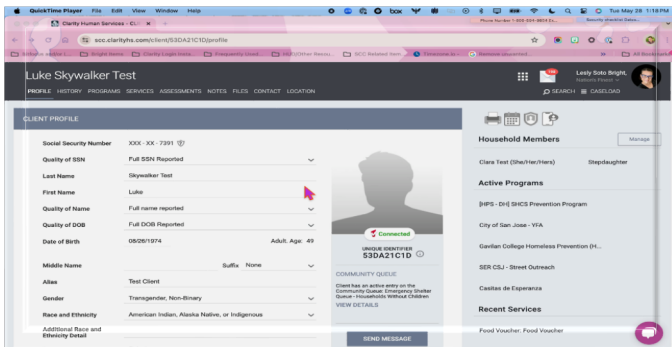
Feature Updates April & June 2024

- The URL for a client's record will now contain the client's [Unique Identifier \(UID\)](#)
- Users can edit the URL to navigate to another client's record



If a client's record has been merged with another client's record, and a user enters the first client's UID into the URL

- The system directs the client to the merged record
- The URL is automatically changed to show the UID of the merged record



Feature Updates - Gender

| The HMIS Element Descriptor for the Gender field was updated Gender (as many as applicable) | |
|--|---|
| Previous Element | Updated Element |
| 3.06.1.1 Female | Woman (Girl, if child) 3.06.1.2 |
| 3.06.1.2 Male | Man (Boy, if child), 3.06.1.3 |
| 3.06.1.3 NoSingleGender | Non-Binary 3.06.1.4 |
| 3.06.1.4 Transgender | Transgender 3.05.1.6 |
| 3.06.1.5 Questioning | Culturally Specific Identity (e.g., Two-Spirit) 3.06.1. |
| 3.05.1.6 GenderNone | Questioning 3.05.1.7 Different Identity* |

Feature Updates - Type Dates in Report Date Range

Before this update, users running a report from the [Report Library](#) could only enter a date for the Report Date

Range and other date prompts by selecting the date from a calendar. With this update, **users can type the dates into the date fields if desired.**



This feature will be available on the LIVE site on Tuesday, June 18, 2024

Feature Updates - New & Updated Help Center Content

| Updated Pages | New Pages |
|--|--------------------------------------|
| How Do I Create a New Client Record? | |
| How Do I Manage Program Goals? | The Link/Unlink Tool |
| Creating and Editing Screens | |
| Personal ID | |

We encourage you to suggest improvements and new features for our products. You can [create feature suggestions](#) or vote, watch, and comment on existing suggestions at ideas.bitfocus.com. Refer to our [Feature Suggestions](#) article for additional details.

Community Housing Queue 180 - Day Change

Previously, a person was automatically removed from the community housing queue **after 390 days of no engagement** in our system.

On **May 9th, 2024**, the time limit for non-engagement changed to **180 days**.

How Does This Change Impact My Clients?

- It will not impact your clients who have activities recorded in the HMIS within the 180-day period prior to May 9
- Prevent automatic removal of your clients by documenting all activities



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in the HMIS

How can I tell how many days my client has been inactive in Clarity?

- You can select your client's referral through their History Tab and on the referral it will indicate their "Last Activity" date.
- In addition, we have created a report - "Length of Time to Queue Expiration (Inactive Threshold DQ)"- in the Data Analysis Tab in Clarity for agency leads and staff with data analysis tab access to review potentially inactive clients.
- Login to Clarity and look for the Data Analysis report under the Santa Clara County HMIS Reports. You'll need to select your agency in the filters and "yes" to the client's active status in your program.

"Length of Time to Queue Expiration (Inactive Threshold DQ)"- in the Data Analysis Tab in Clarity for agency leads and staff with data analysis tab access to review potentially inactive clients.

SCC Queue Expiration for Inactive Threshold changed to 180 days

| Client Full Name | Unique Identifier | Client ID | Community Queue Name | Referral ID | Added Date | Days Since Referral Added to Queue | Last Activity Date | Inactive Referral Threshold | Days Since Referral Was Added or Changed Queues | Days Since Last Activity | Inactive in the next 10 days? | Days Until Inactivity Referral Threshold |
|------------------|-------------------|-----------|----------------------|-------------|------------|------------------------------------|--------------------|-----------------------------|---|--------------------------|-------------------------------|--|
| 55539 | Commun. | 48626 | 2022-09- | 2191 | 2023-11- | 180 | 616 | 177 | Yes | 3 | | |
| 160178 | Commun. | 42873 | 2022-05- | 747 | 2023-11- | 180 | 747 | 177 | Yes | 3 | | |
| 160734 | Commun. | 47679 | 2022-08- | 637 | 2023-11- | 180 | 637 | 177 | Yes | 3 | | |
| 39581 | Commun. | 50741 | 2022-10- | 582 | 2023-11- | 180 | 582 | 177 | Yes | 3 | | |
| 176743 | Commun. | 61819 | 2023-04- | 400 | 2023-11- | 180 | 400 | 177 | Yes | 3 | | |
| 16080 | Commun. | 66790 | 2023-07- | 316 | 2023-11- | 180 | 316 | 177 | Yes | 3 | | |
| 154661 | Commun. | 67082 | 2023-07- | 313 | 2023-11- | 180 | 313 | 177 | Yes | 3 | | |
| 66844 | Commun. | 67064 | 2023-07- | 319 | 2023-11- | 180 | 319 | 177 | Yes | 3 | | |

Keeping Clients "Active" on the CHQ - A Guide

Activities that Maintain a Client Active in the CHQ

- Referral check-in by any staff
- Adding a public alert
- Adding an assessment (ex. VI-SPDAT, Status Update, or Annual Assessment)
- Adding a new program enrollment
- Program exit

- Adding a referral or referral note
- Adding locations or client contact information
- Uploading a client file

Adding coordinated entry events



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MEMOS

Agencies w/Clients Assessed & Not on CHQ

Please note this data was pulled Thursday, June 6th.

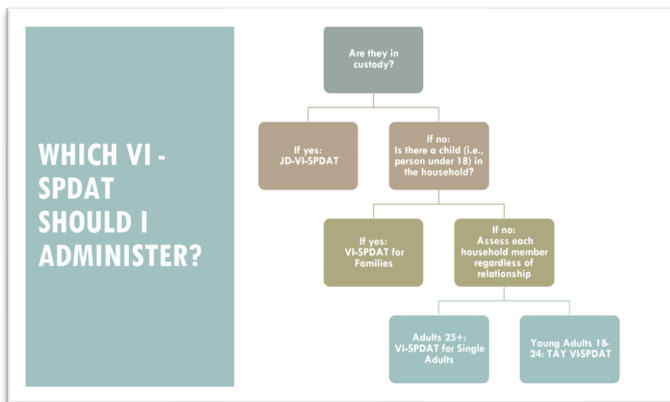
It is possible that Referrals have been processed.

Please be sure and run the report to confirm.

| Agency Name | # of Clients |
|---|--------------|
| HomeFirst | 15 |
| LifeMoves | 14 |
| County: Reentry Resource Center | 12 |
| County: SCVHHS - Custody Health | 9 |
| Roots Community Health Center | 7 |
| Social Impact Team (SIT) Property Owners Downtown Association | 7 |
| County: SCVHHS - Ambulatory | 5 |
| Bill Wilson Center | 3 |
| PATH | 3 |
| Move Mountain View | 2 |
| Amigos de Guadalupe | 2 |
| Downtown Streets Team | 2 |
| Sunnyvale Community Services | 1 |
| County: SCVHHS - BHSD AQA - CSI | 1 |
| County: SCVHHS - BHSD - ADA - FDR | 1 |
| Horizon Services, Inc - DBA Mission Street Sobering Center | 1 |
| County: SCVHHS - BHSD - Access & Unplanned - colleQtive | 1 |
| Community Services Agency of Mountain View | 1 |
| Community Solutions | 1 |
| Mission Possible | 1 |
| CityTeam Ministries | 1 |

Do's & Don'ts - VI-SPDAT

Which VI-SPDAT Should I Administer?



Do's & Don'ts of VI-SPDAT

Dos and Don'ts

| | |
|---|--|
| <p>ALWAYS:</p> <ul style="list-style-type: none"> ✓ Check HMIS first! ✓ Explain the purpose of the survey ✓ Emphasize yes/no or one-word replies ✓ Encourage honesty ✓ Read questions as they are written ✓ Provide clarification if/when requested ✓ Use FAQ handouts to help answer questions | <p>NEVER:</p> <ul style="list-style-type: none"> ✗ Edit an existing VI-SPDAT! ✗ Hand client the survey to complete on their own ✗ Complete the assessment in the client's absence ✗ Complete the assessment only through observation or prior knowledge ✗ Try to case manage while doing the survey ✗ Promise anything as a result of the survey ✗ Lead people to believe there is a waiting list ✗ Share the client's score! |
|---|--|

Upcoming DEW - Program Based Reports - Running Reports & Shortcuts

DATE - Tuesday, July 23rd, 2024

TIME - 10am - 12pm

Please join us for the upcoming Data Engagement Workshop (DEW)

"Program-Based Reports: Running Reports & Shortcuts"

In this workshop we will review how to run some of our most popular program-based reports - and how to export the data for easier reporting.

This is a great training for new and long-time users who want to make sure they are getting everything out of their HMIS!

[Register here!](#)

Using the Help Desk

What Can the Help Desk do...

- New User set-up
- Deactivation of HMIS access
- Reinstatement of HMIS access
- Confirming Training completion
- Assistance with Reports
- Merging client records
- Deleting services/enrollments added in error

And so much more



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Support Email

sccsupport@bitfocus.com

Support Phone

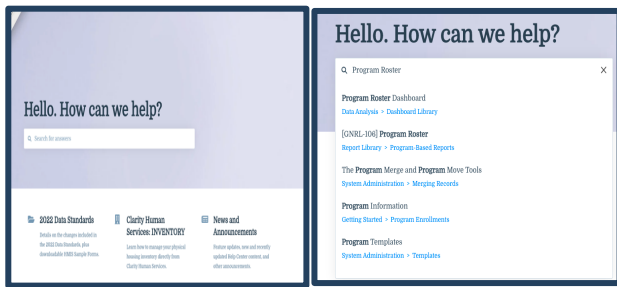
(408) 596.5866 EXT. 2

SCC HMIS Website

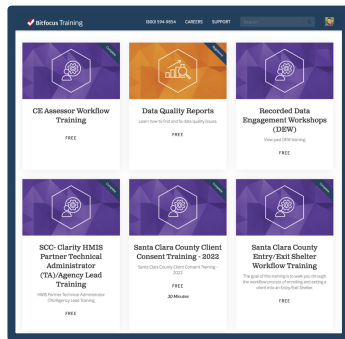
SCC.Bitfocus.com

Resources

Clarity Human Services Help Center



Link to page embedded in image!



Link to page embedded in image!

- You must log in to access the trainings here
- Multiple Training Opportunities and Refreshers
- Select the training you want to watch
- Don't have enough time to watch it all - pick up next time where you left off

Office Hours

Where Are Office Hours Held? Office Hours are conducted from the comfort of your own office! Each Office Hours session is hosted online by your Santa Clara County Clarity System Administration team. You can connect using your computer (recommended so that you can see demos and post questions).

Looker Office Hours

When: Every other Monday of the month Time: 2:00pm-3:00pm

[Zoom \(click here to access\)](#)

Clarity (HMIS) Office Hours

When: Every other Thursday from 10:00am-11:30am

[Zoom \(click here to access\)](#)

Using the Help Desk

When requesting the following please be sure and contact the Help Desk:

1. End User Access
2. Update a users access after completion of the VI-SPDAT required training
3. Verifying an end user has completed required training
4. Access to the SCC HMIS Training Instance/Sandbox
5. General Assistance with reporting

How To Contact the Help Desk

sccsupport@bitfocus.com

Or

(408) 596.5866 Ext. 2

SCC Virtual Suggestion Box

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We value your opinion and insight. Please share with us your suggestions by using our new SCC Virtual Suggestion Box. You can access it by using the link above or directly from the [HMIS Support](#) page under the CONTACT tab and scrolling to the Virtual Suggestion Box option.



Have ideas about an enhancement and/or addition to HMIS?

Have any general questions you'd like to ask?
Let us know! Drop it in the box!

Next Agency Admin Meeting

Meeting Location: [Zoom Link](#)
When: Thursday, July 4th, 2024
Time: 2:00pm - 3:30pm

CANCELLED!

Dates and locations for 2024 meetings are listed on the OSH website:

[CoC Events Calendar - Supportive Housing - County of Santa Clara](#)

Bitfocus Contact Information

Support Team: sccsupport@bitfocus.com
Bitfocus System Administration Team: scc-admin@bitfocus.com

Your Sys. Admin. Team:



Angie Evans

angieevans@bitfocus.com
Senior Project Admin, Santa Clara County
South Bay, CA
800.594.9854 x274



Lesly Soto Bright

leslys@bitfocus.com
Deputy Project Admin, SCC
South Bay, CA
800.594.9854 x256

List of Participants

If you attended the meeting but are not listed, please let us know.

| Agency Name | Representative |
|--|-------------------------|
| Abode Services | Aida Tesfai |
| Abode Services | Luis Gonzalez |
| Abode Services | Will Hoffer |
| Amigos de Guadalupe | Aurora Olivares |
| Asian American Center of Santa Clara County (AASC) | Leticia Barrera H |
| Bible Way / Destiny | Aretha Cromwell |
| California Youth Outreach | Anthony Ortiz Jr. |
| California Youth Outreach | Julian Delgadillo |
| Carry the Vision (CTV) | Renee Ridgway |
| City of San Jose | Marcell Leath |
| City of San Jose | My Nguyen |
| City of San Jose | Nathaniel Montgomery |
| CityTeam Ministries | Christopher Chamberlain |
| Community Services Agency of Mountain View | Sary Soltero |
| Community Solutions | Lindsay Mullins |
| ConXion to Community | Caroline Mireles-Sailor |
| County: OSH | Fang Zhu |

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| | |
|---|---------------------|
| County: OSH | Juan Hernandez |
| County: OSH | Leila Qureishi |
| County: OSH | Taylor David |
| County: Reentry Resource Center | Christian D'Alfonso |
| County: Reentry Resource Center | Juan Guel Jr. |
| County: SCVHHS - BHSD - Access & Unplanned - IHOT | Lindsay Cross |
| County: SCVHHS - BHSD - AOA - FDR | Jeremy Golden |
| County: SCVHHS - BHSD AOA - CSI | Will Norman |
| County: SCVHHS - Custody Health | Antionette Bonner |
| County: SCVHHS - Public Health | Chris Cheung |
| County: SSA - DEBS General Assistance | Lily Vasquez |
| County: SSA - DEBS SSI Advocacy | Cassandra Brenzel |
| Downtown Streets Team | Justin Damrel |
| Emergency Rental Assistance (ERA) | Paulina Soto |
| Family Supportive Housing | Alex Le |
| Gardner Health Services | Mariana Becerra |
| Goodwill of Silicon Valley | Laura Lozoya |
| Housing Choices Coalition | Nooria Alam |
| Housing Choices Coalition | Shireen Alinani |
| Institute on Aging | Christina Strine |
| JobTrain | Ana Rosas |
| JobTrain | Bryanna Corsbie |
| LifeMoves | Daisy Navarro |
| LifeMoves | Liz Lucas |
| Move Mountain View | Taly Leibovici |
| Nation's Finest | Ilaisaane Fifita |
| Nation's Finest | Kim Decker |
| New Directions - Peninsula Healthcare Connection | Meyerlyn Sanchez |
| New Directions - Peninsula Healthcare Connection | Pammi Sandhu |

| | |
|---|------------------------|
| PATH | Aiko Yep |
| Sacred Heart Community Service | Paulina Soto (deleted) |
| Salvation Army | Cesar Esquivel |
| San Jose State University Research Foundation (SJSU) | Jesse Mejia |
| Santa Clara County Office of Education (SCCOE) | Anna Wayne |
| School Health Clinics of Santa Clara County | Rose Anne Pierre |
| School Health Clinics of Santa Clara County | Tran Tran |
| Social Impact Team (SIT) Property Owners Downtown Association | Chris Kendrix |
| St. Andrew's Residential Programs for Youth (STAR) | Vicky Taylor |
| St. Joseph's Family Center | Jose Macias |
| Starlight Community Services | Kutlo Rasetshwane |
| Sunnyvale Community Services | Catherine Farry |
| Superior Court of CA, County of Santa Clara | Roxanna Frias |
| The United Effort Organization | Wei E |
| Unity Care Group | Deepa Bhat |
| VAPAHCS | Maria Magallanes |
| WeHOPE | Anita Blount |
| West Valley Community Services | Elizabeth Ducker |
| West Valley Community Services | Jhoana Diaz |