August 2024 TA/Agency Lead Minutes

MEETING OBJECTIVES

UPDATES

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

IN THE KNOW

- ROI Expiration
- Feature Updates (File Size Limit & SS Changes)
- Auto-Exit Feature
- Deleting Program Enrollments

MEMOS

- Recently Assessed & Not on CHQ
- SCC HMIS Quarterly Compliance Checklist Due
- Next Month's Meeting

<mark>UPDATES</mark>

CoC Updates

- The [CoC NOFO](#) is out!
- Due October 30th
- Timeline and details to come!

Next CoC Membership MTG. Monday, August 12th

- 2:30-4:30pm -open to all!
- **Agenda includes**
- [***Zoom link***](#)
    - Coc Board
    - At-large Seat Nominations
    - Quality Assurance Standard Updates
    - Efforts to Address Criminalization Of Homelessness

- Community Housing Queue Quality Improvement Efforts
- Updates (NOFO, Community Plan To End Homelessness, PIT Count Planning)

- We Are Making Continuous Improvements To The Community Housing Queue, Supportive Housing Referrals, & Matchmaking Process
- We Will Announce Changes As They Happen
- Please Keep An Eye Out For These Changes & Assist Your Agencies In Implementing Them

Upcoming Events – August 2024

UPLIFT Updates

THE POOLED PASS/REPLACEMENT PASS PERIOD

BEGAN ON, 8/1:

****Very Few Passes Are Remaining****
The last remaining passes are being processed

- Requests submitted by 7/31 by agencies who still had first month allocations are processed first
- Any remaining passes will be available on a first-come-first served basis

POC Reminders – Replacement Pass Procedures

- Requests for replacement stickers/badges MUST be

dated for 8/1 or onward, and can only be replaced if there are still stickers available

- To Replace A Pass

1) Submit a request on HMIS, <u>AND</u>

2) Email UPLIFT when this request has been submitted to inform us it is a replacement request, otherwise it will get removed as a duplicate request

General Reminders

If a client no longer needs their pass & sticker is *unused:* notify us so we can reassign the sticker to another client

- o Badges Only can be replaced for current quarter, even if no more stickers are available
- o We cannot obtain additional stickers (passes) from VTA

If a replacement badge is needed, make a request for a "Badge Only" on HMIS AND notify UPLIFT@hhs.sccgov.org

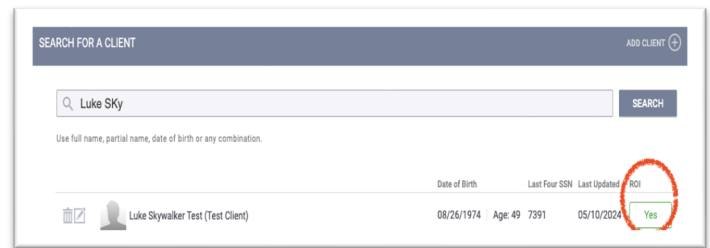## HMIS Newsletter

ROI Expiration

Why does it matter if a client has an invalid or inactive (expiring) ROI?

Clients with an inactive or invalid ROI CANNOT be referred to housing.

Let's make sure this does not happen…

Using the Search Feature

When searching for the client there is a column for ROI – YES means the client has an up-to-date ROI

Searching by UID

When you search directly using the Client UID you are taken directly to the client's profile bypassing the search screen with the option of client matches.

IF the client is missing or has a release that is expired you will see a banner at the top of the client's profile flagging a ROI is needed.
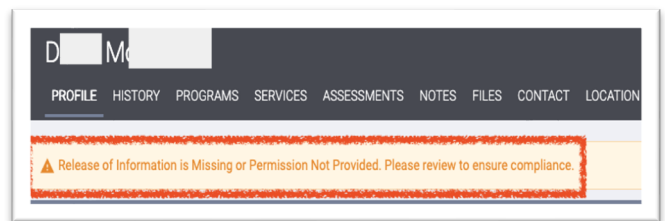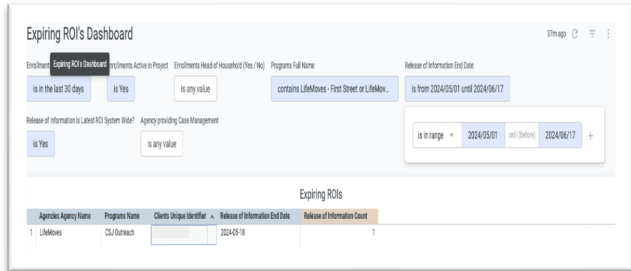

Running Reports in DA Tab
Expiring ROI's Dashboard

Another option when you want to know which ROIs will be expiring within a specific timeframe is by pulling the Expiring ROI's Dashboard Report that is found in the DATA ANALYSIS Tab of Clarity.
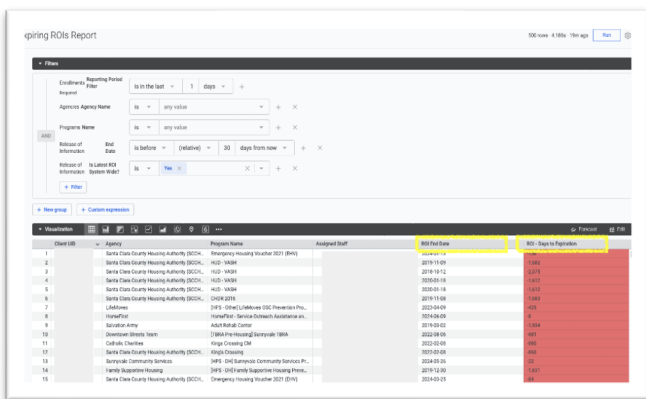
Expiring ROI's Report

The Expiring ROI's Report is another option that is found in the DA TAB.

This report will pull all clients for the selected Agency and Program and the number of days for the ROI to expire or the number of days the RIO has been expired for.


Feature Updates – File Size Limit

In all areas of the system where files or photos can be uploaded

- The size of the file that can be uploaded has increased to 25 MB
- Compressed files can now be uploaded

This update applies to client files, client photos, staff photos, agency documents, vendor documents, ROIs, Encampment photos, and INVENTORY photos).

Feature Updates – Social Security Changes

Currently End Users have the option of entering a clients social security number (SSN) as all zeros (0) when the client does not know their SSN or if the client profile is changed to anonymous or entered as anonymous or if the client prefers not to disclose their SSN.
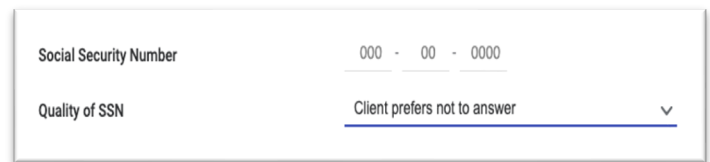
Starting on **Monday, August 12th, 2024**, the use of zeros will **no longer be permitted** and instead will be entered as an X to align with HUD guidance and Federal Reporting purposes

This means that you will need to **discontinue the use of zeros** when entering NEW CLIENTS who may not want to disclose their SSN and instead use an X

You will **not need to correct existing client records**, however if you have a data integration process with external software, you may want to confirm that this new format will import as expected
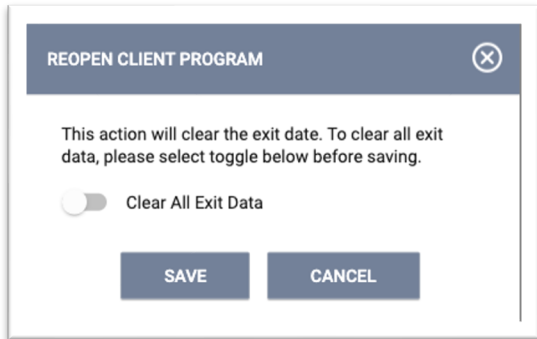
Auto – Exit Feature

When Auto Exit is enabled, the system automatically records a program exit for enrollments under certain conditions; this is called Auto Exit Due to Inactivity

- **AUTO EXIT** - **NO** ENROLLMENTS - CLIENT
- **AUTO EXIT** - **NO** ENROLLMENTS CLIENTS' HOUSEHOLD MEMEBERS
- **AUTO EXIT** – **NO** SERVICES, CE EVENTS and/or ASSESSMENTS

REOPEN CLIENT PROGRAM ⊗

This action will clear the exit date. To clear all exit data, please select toggle below before saving.

◯ Clear All Exit Data

[SAVE] [CANCEL]

- Reopening A CLIENT does not reset the enrollment's time to auto-exit
- Enrollments will be auto-exited again the next day
- To maintain client active, ensure a program related activity is added to the opened enrollment
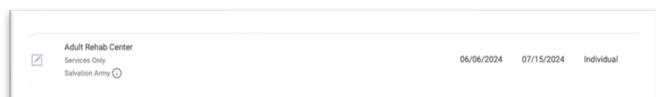
Deleting Program Enrollments
WHY DELETE?
1. Enrollment was an error
2. Enrolled in incorrect program
3. Duplicate Enrollment

Before deleting any program enrollments, or requesting deletion of a program enrollment, check existing SERVICES and ASSESSMENTS under the enrollment

This program enrollment has services attached – there is no Trashcan Icon visible; check for services and assessments
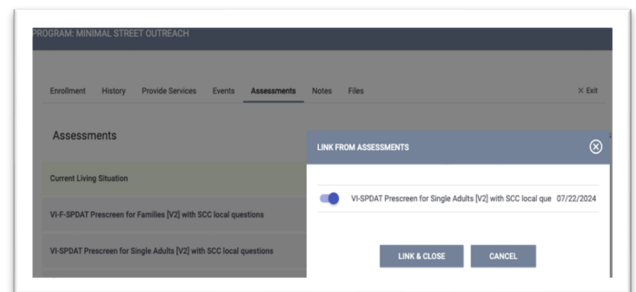
✎ Adult Rehab Center Services Only Salvation Army ⓘ		06/06/2024 07/15/2024 Individual

This program enrollment does not have any services attached – there is is a Trashcan Icon visible, however, be sure and check for assessment as these do not trigger a trashcan

PROGRAM HISTORY

	Program Name	Start Date	End Date	Type
🗑✎ Delete	Sample Program Transitional Housing ABC Agency ⓘ	08/26/2022	**Active**	Individual

- When deleting an enrollment where a VI-SPDAT exists, please [link the assessment to a new CE program]
- If you delete the program without linking the assessment, the client will no longer be considered "participating in Coordinated Entry" by HUD's standards
- Please be sure and link the assessment to the new program enrollment before deleting the program enrollment

Under the ASSESSMENTS TAB select the LINK FROM ASSESSMENTS option - you will get the pop-up. Choose the assessment by clicking on the toggle (it will be blue) and select **LINK & CLOSE**

PROGRAM: MINIMAL STREET OUTREACH

Enrollment History Provide Services Events **Assessments** Notes Files   ⊁ Exit

Assessments

LINK FROM ASSESSMENTS ⊗

Current Living Situation

VI-F-SPDAT Prescreen for Families [V2] with SCC local questions   ◉ VI-SPDAT Prescreen for Single Adults [V2] with SCC local que 07/22/2024

VI-SPDAT Prescreen for Single Adults [V2] with SCC local questions   [LINK & CLOSE] [CANCEL]

The assessment has now been moved to the new enrollment and you can proceed with deleting the "old" enrollment

==MEMOS==
Agencies w/Clients Assessed & Not on CHQ
Please note this data was pulled Thursday, August 1.
It is possible that Referrals have been processed.
Please be sure and run the report to confirm.

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Agency	No. Of Clients
LifeMoves	17
County: SCVHHS - Custody Health	7
HomeFirst	5
County: Reentry Resource Center	4
Bill Wilson Center	3
Social Impact Team (SIT) | Property Owners Downtown Association	3
Amigos de Guadalupe	3
WeHOPE	2
UPLIFT	2
ConXion to Community	2
Family Supportive Housing	2
VAPAHCS	2
California Youth Outreach	2

Agency	No. of Clients
California Youth Outreach	2
Move Mountain View	2
Roots Community Health Center	2
San Jose State University Research Foundation (SJSU)	1
PATH	1
Horizon Services, Inc - DBA Mission Street Sobering Center	1
Silicon Valley Independent Living Center (SVILC)	1
County: SSA - Department of Family and Children's Services (DFCS)	1
County: OSH	1
The United Effort Organization	1

SCC HMIS Quarterly Compliance Certification Checklist

Deadline for submission was…

- *Wednesday, July 31st, 2024 EOB*
- Please note staff at your agency will be made inactive if the list is not received
- Please DO NOT submit the Self Certification Form, instead retain for your records
- Please submit all checklists to scc-admin@bitfocus.com

- Need a refresher on how to do this: Quarterly Security Checklist Report: How to Guide
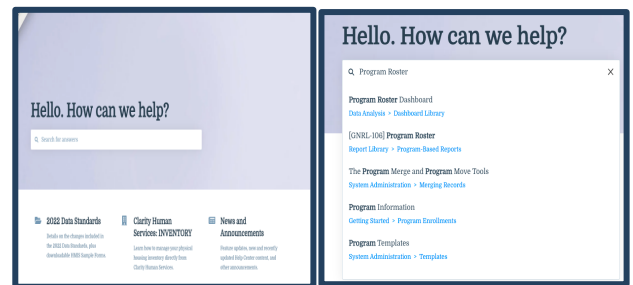
Support Email
sccsupport@Bitfocus.com
Support Phone #
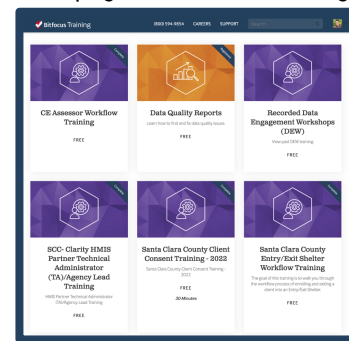(408) 596.5866 EXT. 2
SCC HMIS Website
SCC.Bitfocus.com

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 user's 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

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.
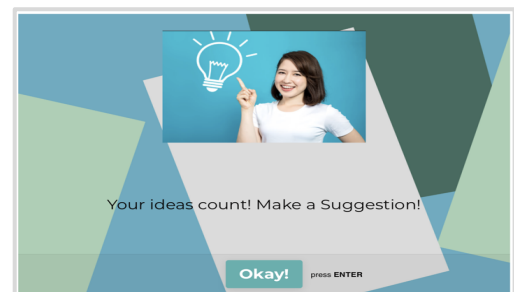
Have ideas about an enhancement and/or addition to HMIS?
Have any general questions you'd like to ask?
Let us know! Drop it in the box!

Next Agency Admin Meeting

Meeting Location: Zoom Link
When: Thursday, September 5th, 2024
Time: 2:00pm – 3:30pm

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

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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	REPRESENTATIVE
Abode Services	Aida Tesfai
Abode Services	Ana Rosas
Abode Services	Luis Gonzalez
Abode Services	Sean Kilger
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
Bill Wilson Center	Laura Foster
Bill Wilson Center	Randi Rosen
Bill Wilson Center	Sujata Panda
Bitfocus	Angie Evans
Bitfocus	Lesly Soto Bright
California Youth Outreach	Anthony Ortiz Jr.
California Youth Outreach	Julian Delgadillo

Carry the Vision (CTV)	Renee Ridgway
Catholic Charities	Michael Strom
City of San Jose	Marcell Leath
City of San Jose	My Nguyen
City of San Jose	Nathaniel Montgomery
Community Services Agency of Mountain View	Sary Soltero
Community Solutions	JaVonne Lewis
Community Solutions	Lindsay Mullins
ConXion to Community	Caroline Mireles-Sailor
County: OSH	Fang Zhu
County: OSH	Leila Qureishi
County: OSH	Taylor David
County: Reentry Resource Center	Juan Guel Jr.
County: SCVHHS - Ambulatory	Rebecca Siqueiros
County: SCVHHS - Public Health	Chris Cheung
County: SCVHHS - Public Health	Norah Ojeda
County: SSA - DEBS General Assistance	Stacy Diaz
County: Valley Health Plan	Geralyn Glenn
Destination: Home	Maureen Damrel
Downtown Streets Team	Justin Damrel
Downtown Streets Team	Maureen Damrel
Emergency Rental Assistance (ERA)	Paulina Soto
Family and Children Services	My Nguyen
Family Supportive Housing	Alex Le
Goodwill of Silicon Valley	Laura Lozoya
HomeFirst	Alisha Parret
HomeFirst	Ana Rosas
HVEHF	Janell Stafford Gutierrez
Institute on Aging	Christina Strine
JobTrain	Ana Rosas
LifeMoves	Cynthia Mar
LifeMoves	Daisy Navarro

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Midtown Family Services	Stuart Richardson
Nation's Finest	Ilaisaane Fifita
Nation's Finest	Kim Decker
North East Medical Services (NEMS)	Candido Anicete
Pathway Society	Rita Anzualda
Razing the Bar	Molly Orsburn
Roots Community Health Center	Kairi Bynum
Sacred Heart Community Service	Paulina Soto
Salvation Army	Dolores Garcia
Salvation Army	Owen Persons
San Jose State University Research Foundation (SJSU)	Jesse Mejia
Santa Clara Family Health Plan (SCFHP)	Andrew Somera
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	Emily Ferry
South County Compassion Center	Angelina Valverde
St. Andrew's Residential Programs for Youth (STAR)	Vicky Taylor
Sunnyvale Community Services	Catherine Farry
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