

# September 2024 TA/Agency Lead Minutes



## MEETING OBJECTIVES

### UPDATES

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

### IN THE KNOW

- Coordinated Entry (CE) Updates
- September 2024 Feature Updates
- Staff Inbox & Secure Messaging
- VI-SPDAT Dashboards
- SCC User Satisfaction Survey – 2024

### MEMOS

- Recently Assessed & Not on the CHO
- Requesting Report Assistance
- Next Month's Meeting

### UPDATES

#### CoC Updates

#### Upcoming Events

MON	TUES	WED	THURS	FRI
2 7am SCC Looker Office Hours HOLIDAY – Labor Day	3	4	5 HMIS Technical Administrator (TA)/Agency Lead Meetings	6
9	10 10am Data Think Tank	11 9:30am Service Providers Network Meeting	12 10am SCC Clarity Office Hours 1pm Coordinated Entry Work Group	13
16	17	18	19	20
23 7am SCC Looker Office Hours	24	25 10am SCC TA Office Hours	26 9am SCC CoC VI-SPDAT Training 10am SCC Clarity Office Hours 3pm RRIH & Employment Initiatives Meeting In-Person Chancellor Training Center Suite #102 2310 N First St. San Jose, CA 95131	27
30 7am SCC Looker Office Hours			<b>September 2024</b>	

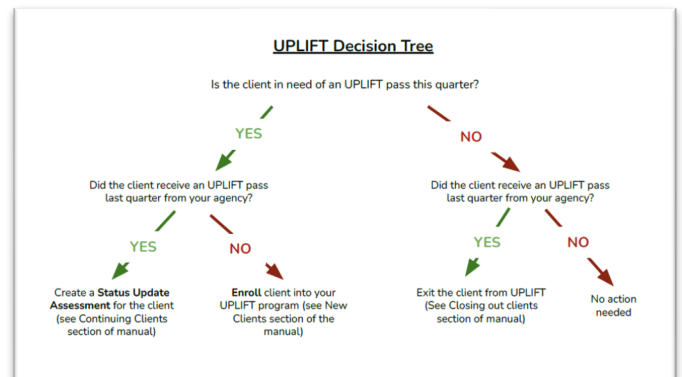
## UPLIFT Updates

### Q2, FY 2025

#### October – December Starts 9/13/2024

Pre-Quarter Checklist – All Providers

- You MUST exit any client that did not receive an UPLIFT pass (sticker) from your agency during Q1 July-September
- Only clients who received a pass last quarter from your agency are considered “continuing clients” and can have a status assessment submitted
- ALL other clients must be exited and have a new enrollment form submitted for them dated for Q2



## UPLIFT Program Coordinators

- Allocation surveys have been sent out -Due 9/11
- Final allocations sent 9/12
- Email [UPLIFT@hhs.sccgov.org](mailto:UPLIFT@hhs.sccgov.org) if the program coordinator at your agency changed

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## Reminders for Requesting Passes

- MUST be dated 9/13/23 or onward for Oct - Dec
- Request either a "Sticker" OR "Badge and Sticker" when requesting a pass for the 1st time
- ONLY request a "Badge and Sticker" if
  1. Enrolling a new client
  2. 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 it can be processed

## Error Reminders

We are continuing to track user errors-users lose UPLIFT access after 4 errors

## Common Errors

- No photo or low-quality photo
- Client's face obscured in photo (sunglasses, mask)
- Wrong quarter selected
- ROI Issue
- Under 18

## HMIS Newsletter



## IN THE KNOW

### Coordinated (CE) Updates

### Funding Competition

Annual Renewal Demand \$38,749,720

CoC Bonus \$4,649,966

DV Bonus \$1,754,534

## CoC Funding Competition Process & Timeline

Local applications due	Sept 10, by 5pm
Rank & Review Panel interviews for new projects	Sept 30 – Oct 4
Appeals due	Oct 9, by 5pm
CoC Board approves Ranked List	Oct 11, 3-4pm
CoC application due	Oct 30



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## PIT Count

The Point-in-Time (PIT) count is a count of sheltered and unsheltered people experiencing homelessness on a single night

- Required by HUD, typically conducted in the last 10 days of January
- Count occurs in all 15 cities and unincorporated areas of Santa Clara County, conducted by teams comprised of volunteers paired with guides with lived experience
- 2025 Counts: unsheltered count, unsheltered youth count sheltered count, and institution count
- Monthly community planning meetings will begin September 2024
- Led by OSH in partnership with our PIT Count contractor – For questions contact Leila Qureishi [leila.quireishi@hhs.sccgov.org](mailto:leila.quireishi@hhs.sccgov.org)

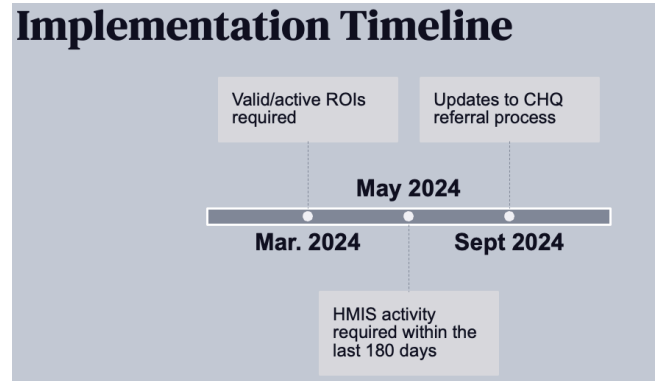
## Community Housing Queue Data Quality Improvement Plan & Resources

### Continuous Improvement Approach

- Align with current CES redesign work
- Expedite housing placements
- Keep up with updated housing referral processes
- More accurate tracking of housing referral needs
- Most effectively use limited resources

### How are decisions made?

- Review local data
- Learn from similar communities
- Gather feedback



### Let's Work Together

Our commitment	How you can help
Sharing quality improvement updates in a variety of ways (info on next slide)	Stay in the know & share with your colleagues
Providing tools/resources to make sure your eligible clients stay on the CHQ	Work with your agency & colleagues to implement changes
Giving trainings as needed	Ask questions! <a href="mailto:support@bitfocus.com">support@bitfocus.com</a> 408-596-5866 ext. 2

Keep an eye out for changes & resources shared on a rolling basis

## Stay in the Loop

### Updates will be shared at

- HMIS Agency Lead meetings
- Email updates to all HMIS users (from Bitfocus) and to CoC listserv
- Bitfocus Monthly Newsletter
- CHQ Data Quality Improvement Plan & Resources document ([link here](#))

As needed: trainings at committee/workgroup meetings

## Referral Process Changes

- Centralized referral email
- Standardized referral submission requirements
- CHQ pulled from Looker (agencies must refer to queue from HMIS)
- New criteria for those re-referred to CHQ (if referral is unsuccessful)

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## When Is A Client Re-referred To The CHQ?

<b>Referred to CHQ</b>	Client referred to a supportive housing program, but is ineligible (e.g., age)
<b>Closed &amp; Not Returned to CHQ</b>	<ul style="list-style-type: none"> <li>Unable to locate</li> <li>Lack of engagement</li> <li>Incarcerated at the time of referral</li> <li>Declined</li> <li>Self-resolved</li> <li>Out of County</li> <li>Deceased</li> <li>Incorrect assessment (e.g., should be a single adult assessment, but has a family assessment)</li> </ul>

## Resources

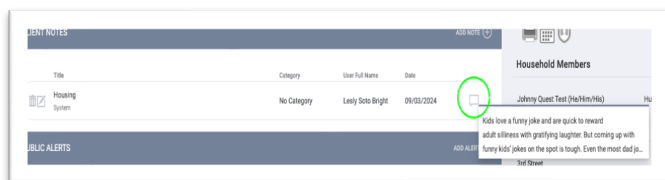
- [Quarterly trainings \(first late Sept\)](#)
- [CoC Provider Toolkit webpage](#) includes:
  - [CHQ Data Quality Improvement Plan & Resources \(updated 9.3.24\)](#)
  - [Supportive Housing Referral Process \(updated 8.27.24\)](#)

## September 2024 Feature Updates

Updated: Preview Notes with Icon Pop-up  
[Notes](#) now include an icon that allows users to see a preview of the note's content. This update aims to give users a more accessible view of notes in a client's profile, both at the client and program levels.

To access the preview, hover the mouse cursor over the "Notes" icon.

Live on September 9<sup>th</sup>!



with HMIS End Users

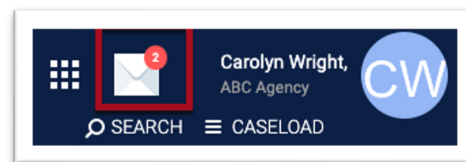
Staff members can securely communicate with other End users who use HMIS via the internal messaging system.

- Search Messages
- Promote Collaboration – Message Agency Leads
- Use real client names and PII

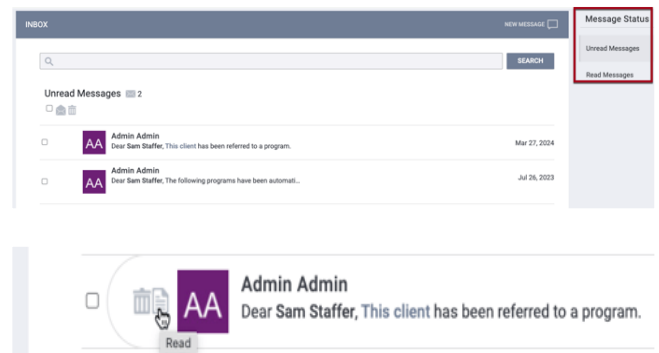
Use MyConnectSV – you can connect directly to clients as well

## Accessing the Inbox

The inbox is accessed by clicking the envelope icon in the top right corner of the screen. A number next to the envelope icon indicates that you have unread messages.



When you click the envelope icon to open the inbox, you will see a **Message Status** sidebar that allows you to select whether to view *Unread Messages* or *Read Messages*.



## VI-SPDAT Dashboards

## Staff Inbox & Secure Messaging

[Staff Inbox & Secure Messaging](#) – Communicating



# September 2024 TA/Agency Lead Minutes

Unique Identifier	Personal ID	Agency Name	Program Name	Project Type Code	Enrollment ID	Household Type	Project Start Date	Project End Date	Assessment Name	Assessment Date	Assessment Score	Row Limit Alert
1		Abate Services	BCP Housing Maintenance/Continuation of Care Program	PI - Permanent Supportive Housing (ability received for entry)	138581	Single Adult	2017-01-01		VI Report Prepared for Single Adults (SI) with SCC total questions	2018-11-04	17	
2		Abate Services	BCP Housing Maintenance/Continuation of Care Program	PI - Permanent Supportive Housing (ability received for entry)	138468	Single Adult	2017-01-01		VI Report Prepared for Single Adults (SI) with SCC total questions	2018-10-12	14	
3		Abate Services	BCP Housing Maintenance/Continuation of Care Program	PI - Permanent Supportive Housing (ability received for entry)	144031	Single Adult	2017-01-01		VI Report Prepared for Single Adults (SI) with SCC total questions	2018-09-18	10	
4		Abate Services	BCP Housing Maintenance	PI - Permanent Supportive	138105	Single Adult	2017-01-06		VI Report Prepared for	2017-04-21	15	

Unique Identifier	Personal ID	Agency Name	Program Name	Project Type Code	Enrollment ID	Household Type	Project Start Date	Project End Date	Count of VI Assessments	Row Limit Alert
1		Abate Services	CCP Housing Maintenance/Continuation of Care Program	PI - Permanent Supportive Housing (ability received for entry)	131103	Single Adult	2017-01-01		0	
2		Abate Services	CCP Housing Maintenance/Continuation of Care Program	PI - Permanent Supportive Housing (ability received for entry)	131482	Single Adult	2017-01-01		0	
3		Abate Services	CCP Housing Maintenance/Continuation of Care Program	PI - Permanent Supportive Housing (ability received for entry)	131744	Household with Children	2017-01-01		0	
4		Abate Services	CCP Housing Maintenance/Continuation of Care Program	PI - Permanent Supportive Housing (ability received for entry)	133381	Single Adult	2017-01-01		0	
5		Abate Services	CCP Housing Maintenance/Continuation of Care Program	PI - Permanent Supportive Housing (ability received for entry)	149964	Household with Children	2020-01-01		0	

This Look contains an active client list for Head of Households that have had at least one VI in the past, but have had no VI-type assessments in the past 365 days. Row Limit Alert: The Row Limit Alert column is a visual aid to flag if the look has exceeded row limit, truncating results in the table. If these cells are red, the look must be filtered to a smaller universe, or downloaded to view all results.

This Look contains an active client list for Head of Households with no VI-type assessments. Row Limit Alert: The Row Limit Alert column is a visual aid to flag if the look has exceeded row limit, truncating results in the table. If these cells are red, the look must be filtered to a smaller universe, or downloaded to view all results.

## Recently Assessed & Not On the CHQ

Agency	No. of Clients
HomeFirst	8
County: SCVHHS - Ambulatory	6
LifeMoves	6
County: Reentry Resource Center	4
WeHOPE	4
San Jose State University Research Foundation (SJSU)	3
Social Impact Team (SIT)   Property Owners Downtown Association	3
Community Services Agency of Mountain View	2
Community Solutions	2
PATH	1
Downtown Streets Team	1
Roots Community Health Center	1
County: SCVHHS - BHSD - AOA - FDR	1
Silicon Valley Independent Living Center (SVILC)	1
County: OSH	1
The United Effort Organization	1
Unity Care Group	1
ConXion to Community	1
Bill Wilson Center	1
Midtown Family Services	1

## Requesting Report Assistance

Do you ever wonder what report you should be running or if you understand what the report has kicked back? We completely understand.

You have a few options on how to get assistance with this minor challenge.

1. Join [HMIS Office](#) (Every other Thursday) or [Looker Office](#) (Every other Monday) Hours
2. Contact the Help Desk: [sccsupport@bitfocus.com](mailto:sccsupport@bitfocus.com)


Email Your Sys. Admin. Team at [scc-admin@bitfocus.com](mailto:scc-admin@bitfocus.com)

## Be sure to also include the following...

1. **Name of the report** you are using (is it a canned HMIS/Pentaho report) or is it a Looker/Data Analysis report
2. What are the **parameters** you are using (what are the filters)
  - a. Agency/Program Name
  - b. Dates used
  - c. Active/Inactive clients
  - d. Is there a **specific data element** you are

## SCC User Satisfaction Survey 2024

**We invite all Santa Clara County HMIS users to participate in this HMIS satisfaction survey, helping us to understand how you use HMIS and how we can improve your support.**



How is HMIS working for you?  
2024 HMIS User Satisfaction Survey

[OK, let's get started](#) press Enter

Your anonymous responses to our 14-question survey will help us to improve HMIS in Santa Clara County.

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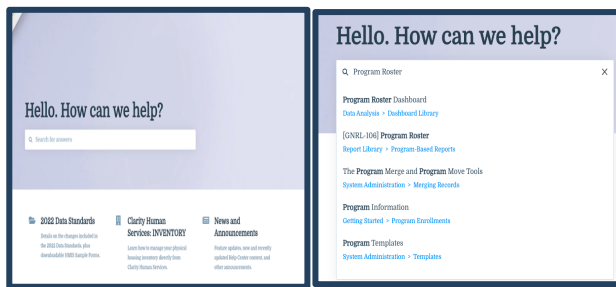
trying to pull, if so, what is it

- e. If the report is pulling data, you are not expecting, tell us what that data is (e.g., the number of clients within the report range for section x, y, z seems too high)

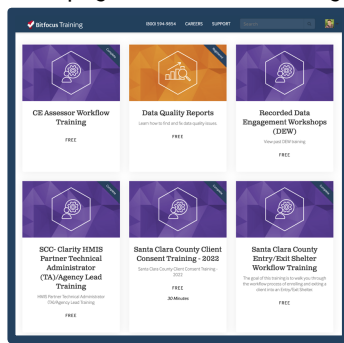
- 3. Provide any other **details you think would be helpful** - remember we need your assistance in helping you figure it out; this will also minimize the back-and-forth emails

## 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](mailto:sccsupport@bitfocus.com)

Or

(408) 596.5866 Ext. 2

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## 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, October 3<sup>rd</sup>, 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](mailto:sccsupport@bitfocus.com)

Bitfocus System Administration Team: [scc-admin@bitfocus.com](mailto:scc-admin@bitfocus.com)

## Your Sys. Admin. Team:



### Angie Evans

[angieevans@bitfocus.com](mailto:angieevans@bitfocus.com)

Senior Project Admin, Santa Clara County

South Bay, CA

800.594.9854 x274



### Lesly Soto Bright

[leslys@bitfocus.com](mailto: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	Agency Rep.
Abode Services	Ana Rosas
Abode Services	Jason King
Abode Services	Will Hoffer
Abode Services	Luis Gonzalez
Amigos de Guadalupe	Aurora Olivares
Asian American Center of Santa Clara County (AASC)	Leticia Barrera H
Bible Way / Destiny	Aretha Cromwell
Bill Wilson Center	Sujata Panda
Bill Wilson Center	Randi Rosen
Bill Wilson Center	Laura Foster
Bill Wilson Center	Jason King
California Youth Outreach	Anthony Ortiz Jr.
California Youth Outreach	Julian Delgadillo
Carry the Vision (CTV)	Renee Ridgway
City of San Jose	My Nguyen
City of San Jose	Marcell Leath

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City of San Jose	Nathaniel Montgomery
CityTeam Ministries	Christopher Chamberlain
Community Services Agency of Mountain View	Amy Kaiser
Community Solutions	Jocelyne Ramirez
Community Solutions	Lindsay Mullins
ConXion to Community	Caroline Mireles-Sailor
County: OSH	Fang Zhu
County: OSH	Leila Qureishi
County: OSH	Juan Hernandez
County: OSH	Shelly Barbieri
County: OSH	Taylor David
County: Reentry Resource Center	Juan Guel Jr.
County: SCVHHS - Ambulatory	Rebecca Siqueiros
County: SCVHHS - BHSD - Access & Unplanned - IHOT	Lindsay Cross
County: SCVHHS - BHSD - AOA - FDR	Jeremy Golden
County: SCVHHS - BHSD AOA - CSI	Will Norman
County: SCVHHS - Public Health	Chris Cheung
Covenant House California	Alejandra Barajas
Destination: Home	Maureen Damrel
Downtown Streets Team	Justin Damrel
Downtown Streets Team	Maureen Damrel
Emergency Rental Assistance (ERA)	Kristen Constanza
Family and Children Services	My Nguyen
Goodwill of Silicon Valley	Micheal Baca
HomeFirst	Ana Rosas
HomeFirst	Alisha Parret
Housing Choices Coalition	Nooria Alam
Institute on Aging	Christina Strine

International Children Assistance Network (ICAN)	Kit Nguyen
JobTrain	Ana Rosas
LifeMoves	Juan Hernandez
LifeMoves	Liz Lucas
Mental Health Systems (MHS)	Mike Michel
Midtown Family Services	Stuart Richardson
Nation's Finest	Kim Decker
North East Medical Services (NEMS)	Candido Anicete
Roots Community Health Center	Destinee Utley
San Jose State University Research Foundation (SJSU)	Victoria Kirschner
Santa Clara County Office of Education (SCCOE)	Emiko Taylor
School Health Clinics of Santa Clara County	Rose Anne Pierre
Social Impact Team (SIT)   Property Owners Downtown Association	Emily Ferry
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
Stanford Health Care - Department of Social Work and Case Management	Priscilla Lopez
Starlight Community Services	Kutlo Rasetshwane
Sunnyvale Community Services	Catherine Farry
Superior Court of CA, County of Santa Clara	Roxanna Frias
The United Effort Organization	Marcus Como
Unity Care Group	Deepa Bhat
VAPAHCS	Maria Magallanes
WeHOPE	Anita Blount



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West Valley Community Services	Elizabeth Ducker
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