# SCC Technical Admin. (TA)/Agency Lead Meeting
## Thursday, August 1, 2024

Bitfocus
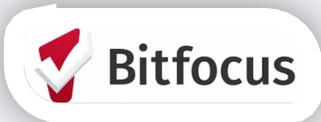
# Getting to Know You!

## What/Who Do You Take the Most Photos Of?
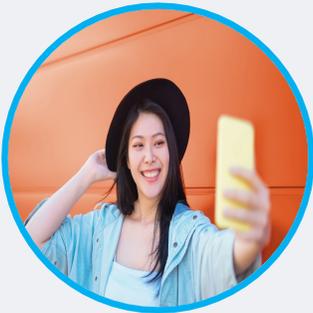
**Yourself** – *Let Me Capture My Moment!*

**Your Children** – *They Are Our Future!*

**Your Partner** – *Where There Is Love There Is Life!*

**Your Pets** - They Complete You!

**Food**– Ways To Your Heart!

**Vacation!**– No Excuse Needed!

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**03**

Recently Assessed & Not on CHQ

SCC HMIS Quarterly Compliance

Checklist DUE

Next Month's Meeting

COC UPDATES

# CoC Updates

The CoC NOFO is out! → Due October 30th → Timeline and details to come!

# CoC Updates



## AGENDA INCLUDES

**Zoom link**

**NEXT CoC MEMBERSHIP MTG. MONDAY, AUGUST 12TH**

**2:30–4:30PM**

**OPEN TO ALL!**

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)

# CoC Updates

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

# August 2024

| MON | TUES | WED | THURS | FRI |
|---|---|---|---|---|
| | | | **1**<br>10am SCC Clarity Office Hours<br><br>HMIS Technical Administrator (TA)/Agency Lead Meeting | **2** |
| **5**<br>2pm SCC Looker Office Hours | **6**<br>10am SCC Homelessness Continuum of Care Substance Use Treatment Services: Engagement, Treatment, and Recovery | **7** | **8** | **9** |
| **12**<br>2:30pm CoC Membership Meeting | **13**<br>10am Data Think Tank | **14**<br>9:30am Service Providers Network Meeting | **15**<br>10am SCC Clarity Office Hours | **16** |
| **19**<br>2pm SCC Looker Office Hours | **20** | **21** | **22**<br>3pm RRH & Employment Initiatives Meeting In-Person<br>Charcot Training Center Suite #102<br>2310 N First St. San Jose, CA 95131 | **23** |
| **26** | **27** | **28**<br>10am SCC TA Office Hours | **29**<br>9am SCC CoC VI-SPDAT Training<br>10am SCC Clarity Office Hours | **30** |

UPLIFT UPDATES

# UPLIFT Updates – Q1 FY 2025 July - September

<<<<<

## THE POOLED PASS/REPLACEMENT PASS PERIOD BEGAN TODAY, 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

# UPLIFT Updates – 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, **AND**

  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

# UPLIFT Updates – Reminders

We cannot obtain additional stickers (passes) from VTA

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

Badges Only can be replaced for current quarter, even if no more stickers are available
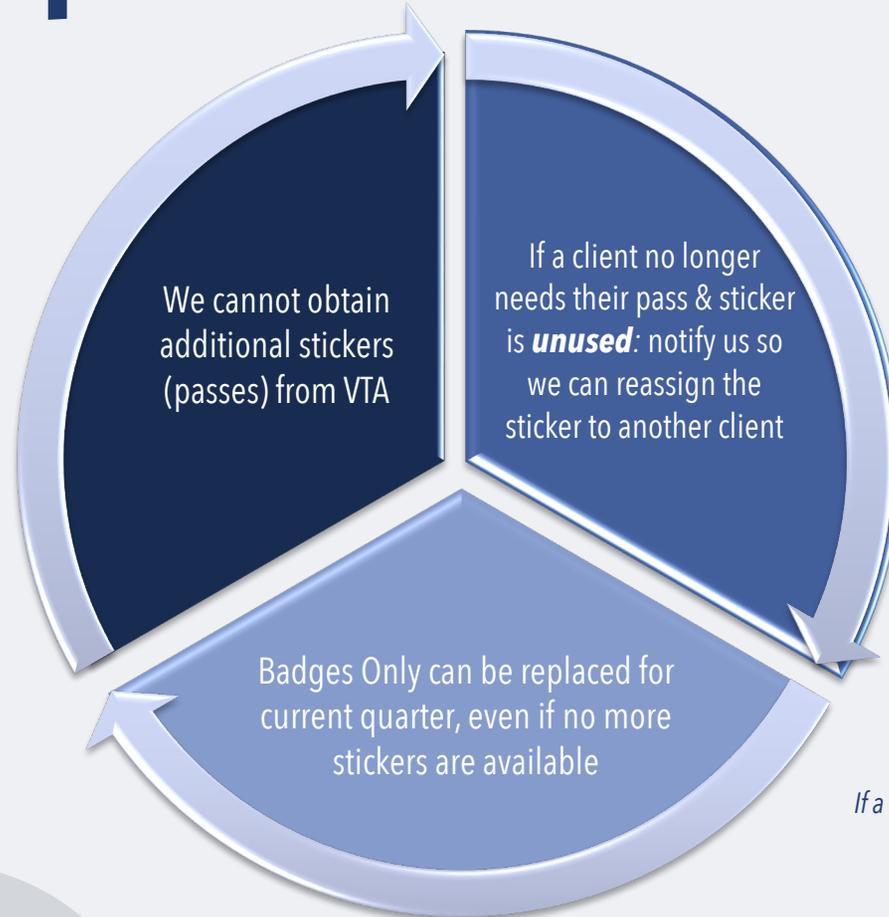
*If a replacement badge is needed, make a request for a "Badge Only" on HMIS AND notify UPLIFT@hhs.sccgov.org*

# HMIS NEWSLETTER

# HMIS Newsletter



**Santa Clara HMIS News**

**July 2024**

Welcome to the Santa Clara HMIS July 2024 newsletter!

**In this edition you'll find the following:**

- SCC HMIS Quarterly Compliance Certification Checklist
- July 2024 Feature Updates
- Auto Exit Feature
- Deleting Program Enrollments
- Social Security Number Changes
- Report Spotlight - [HUDX-225] HMIS Data Quality Report
- Clients Assessed & Not on CHQ
- Clarity Connect (Reminder)
- Meetings/Upcoming Events
- Check Out This Fun Poll – Are you team wired, team wireless, or neither?
- Bitfocus is Hiring!

# ROI EXPIRATION

# 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…

# ROI Expiration – 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

SEARCH FOR A CLIENT                                                    ADD CLIENT ⊕

🔍 Luke SKy                                                            SEARCH

Use full name, partial name, date of birth or any combination.

| | | Date of Birth | Last Four SSN | Last Updated | ROI |
|---|---|---|---|---|---|
| 🗑 ✎ 👤 Luke Skywalker Test (Test Client) | | 08/26/1974 \| Age: 49 | 7391 | 05/10/2024 | Yes |

# ROI Expiration – 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.

# ROI Expiration – Searching by UID

# ROI Expiration – 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.

# ROI Expiration – Running a Report in DA Tab

# ROI Expiration – Running Reports in DA Tab

**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.

# ROI Expiration - Running Reports in DA Tab

**FEATURE UPDATES**

*File Size*

*&*

*Social Security Changes*

# FILE CHANGES

# 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 <u>client files</u>, <u>client photos</u>, <u>staff photos</u>, <u>agency documents</u>, <u>vendor documents</u>, <u>ROIs</u>, <u>Encampment photos</u>, and <u>INVENTORY photos</u>).
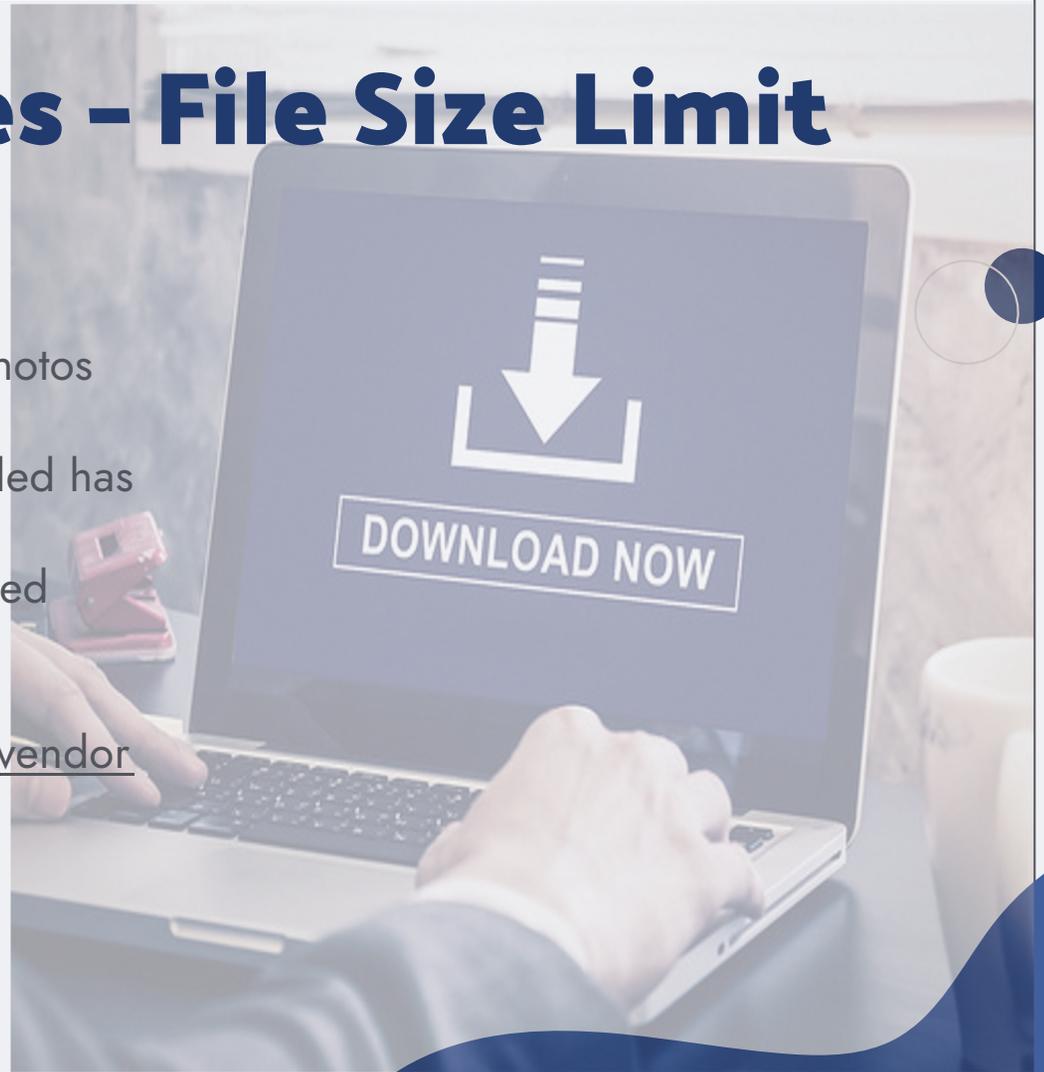
# SOCIAL SECURITY (SSN) CHANGES

# Feature Updates – SSN 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.

# Feature Updates – SSN Changes

+ + + + +

Social Security Number          000  -  00  -  0000

Quality of SSN                  Client prefers not to answer          ⌄

<<<<<

# Feature Updates – SSN Changes

+ + + + +

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

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# AUTO – EXIT FEATURE

# 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 Feature

**AUTO EXIT** — **NO** ENROLLMENTS - CLIENT

**AUTO EXIT** — **NO** ENROLLMENTS CLIENTS' HOUSEHOLD MEMEBERS

**AUTO EXIT** — **NO** SERVICES CE EVENTS ASSESSMENTS

# Auto – Exit Feature – Reopen Client

**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

# Deleting Program Enrollments

**WHY DELETE?**
Enrollment was an error
Enrolled in incorrect program
Duplicate Enrollment

# Deleting Program Enrollments



Before **DELETING** any program enrollments, or requesting deletion of a program enrollment, **CHECK** existing **SERVICES** and **ASSESSMENTS** under the enrollment

# Deleting Program Enrollments

This program enrollment has **services attached** — there is **no Trashcan Icon** visible; check for services and assessments



| Adult Rehab Center | | | |
|---|---|---|---|
| Services Only | 06/06/2024 | 07/15/2024 | Individual |
| Salvation Army ⓘ | | | |

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 |
|---|---|---|---|
| Sample Program | | | |
| Transitional Housing | 08/26/2022 | **Active** | Individual |
| ABC Agency ⓘ | | | |

Delete

# Deleting Program Enrollments

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

# Deleting Program Enrollments

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**



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

**RECENTLY ASSESSED**

**&**

**NOT ON THE CHQ**

# Recently Assessed & Not on CHQ

| 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

# 4

# 15

**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

**NEXT MONTH'S MEETING**
**Thursday, September 5th, 2024**