Bitfocus


Welcome to the Marin County HMIS August 2024 newsletter!

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



# Upcoming Events

## HMIS Agency Leads Meeting*

**Wednesday, September 25, 2-3 p.m. | *Agency Leads Only: Register HERE**

**_*Please note_** *that this is a NEW Zoom series, so you will need to register again to get the new meeting series on your calendar. Also, the September meeting will be on the 4th Wednesday of the month instead of the 3rd Wednesday!*

**We are asking the designated HMIS Agency Leads and Security Officers to join this meeting on a bi-monthly basis.** Of course, if you absolutely cannot make it, please send a representative. Workgroup participants will support communications between the county, Bitfocus and agency staff with regards to community initiatives, training, privacy, security, program and data management.

## News

### Farewell to Carrie Sager

Carrie Sager has been an anchor in the Marin County Department of Health and Human Services for many years now. We bid her farewell and wish her congratulations as she closes her chapter with Marin County and begins her new one with Homeward Bound of Marin. Thank you, Carrie, for your years of service to Marin County! Congratulations on your new role.

Nikolas Brady will be the main HMIS point of contact for Marin County in the meantime. Please direct your HMIS questions to Nikolas at **Nikolas.Brady@marincounty.gov**. For any general CE questions, please reach out to **CE@marincounty.gov**.

## Announcements

### Special Announcement: The Next Generation of Clarity Human Services

We have some exciting news to share with you! Clarity is getting an exciting update to its look and feel and we are eager for you to take a look! Clarity Human Services will be launching the "Next Generation of Clarity Human Services" - which is a brand new User Interface (UI) beta - on September 17 at Clarity Connect.

The beta version of the new user interface will first focus on the main “client/program” area of the system: client profiles, household management, program enrollments, and services. This update will mean that Clarity is much more mobile friendly for staff entering data via tablets or phones. It will also be easier to see the steps or “workflow” for entering data to help users enter all required data along the way. For more information on the UI beta, please **click here**.

We will be working with Marin County on an implementation plan, but once the new UI is available in Clarity, you will be able to go back and forth between the new and existing user interfaces with the click of a button. Any features that are not yet available in the new user interface will automatically route you back to the existing interface to complete your work.

This is an ongoing discussion and we appreciate your partnership!

## Clarity Human Services Updates

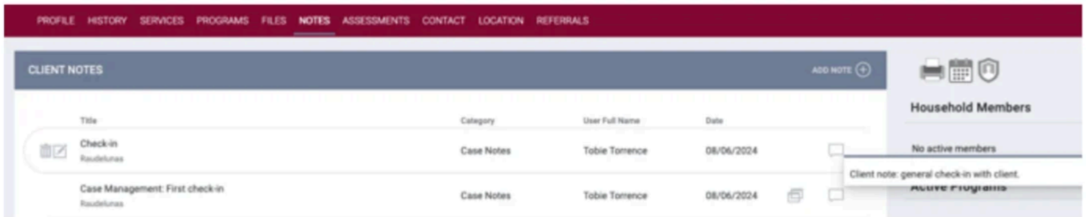
## Feature Updates

**Updated: Preview Notes with Icon Pop-up - *coming in September***

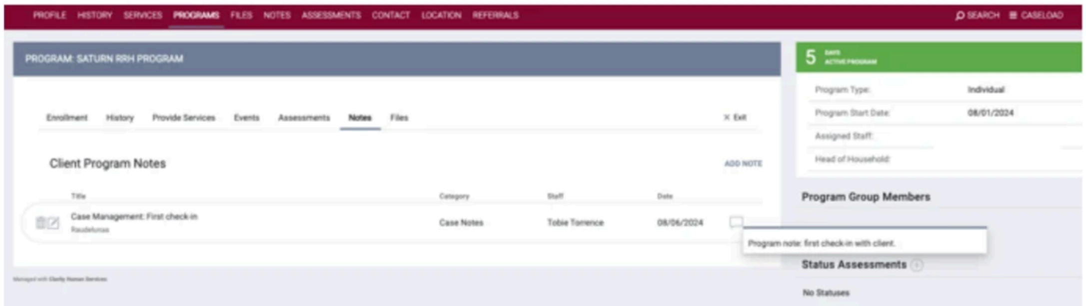
**Notes** now include an icon that allows you to see a preview of the note’s content. This update aims to give you a more accessible view of notes in a client’s profile, both at the client and program levels.

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

Client Notes:




Client Program Notes:




The Notes icon is visible based on **sharing settings** and **access rights**.

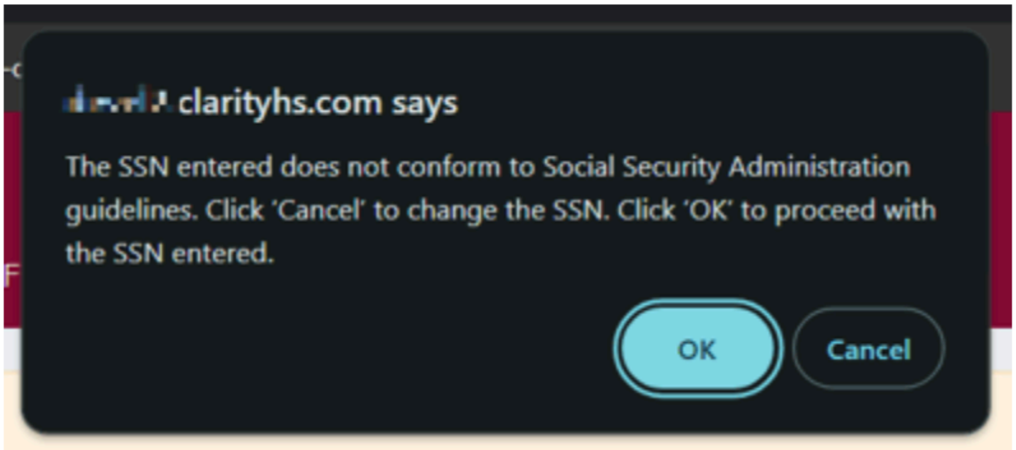
---

## Updated: Invalid Social Security Number (SSN) Warning - *August 2024*

When you **enter a SSN for a client**, the system will check to see if the SSN is valid based on Social Security Administration guidelines. An SSN is considered invalid if any of the following are true:

- The last four digits of the SSN are ‘0000’
- The first three digits are ‘000’, ‘666’, or start with '9'
- The middle digits (i.e., digits 4 and 5; the second grouping of digits) are ‘00’
- The digits are repetitive, like 000-00-0000, 111-11-1111, 333-33-3333, etc.
- The digits are sequential, like 123-45-6789 or 987-65-4321.

If the SSN is invalid, the system displays the following pop-up: “‘*The SSN entered does not conform to Social Security Administration guidelines. Click ‘Cancel’ to change the SSN. Click ‘OK’ to proceed with the SSN entered.*” This pop-up appears *before* the “*An existing client has been found matching the SSN entered*” pop-up appears.




**If you click “Cancel”:**

- The pop-up disappears
- Your mouse will return to the first digit of the SSN.
- The SSN field is underlined in red.
- You can change the SSN and save the profile with the edited SSN.
- If you enter another invalid SSN, the pop-up appears again. This continues until a valid SSN (or one with 1-9 non-numeric characters) is entered.

**If you click “OK”:**

- The pop-up disappears.
- The SSN field is not underlined in red.
- You can save the profile with the invalid SSN.

---

## Updated: Allow Entry of Non-Numeric Characters for Unknown/Refused SSN Digits - *August 2024*

Clarity will now allow you to enter a non-numeric character for any digits of a client’s Social Security Number (SSN) that is unknown or refused by the client, and the system will automatically convert those non-numeric characters to an “x.”

- If a non-numeric character is entered for all 9 digits of the SSN, the “Quality of SSN” field defaults to “Client doesn’t know” but is editable.
- If any digit in the SSN has a non-numeric character (such as xxx-45-6789, 123-xx-6789, 12x-x5-6789, 123-45-x789, etc.), and there are no more than

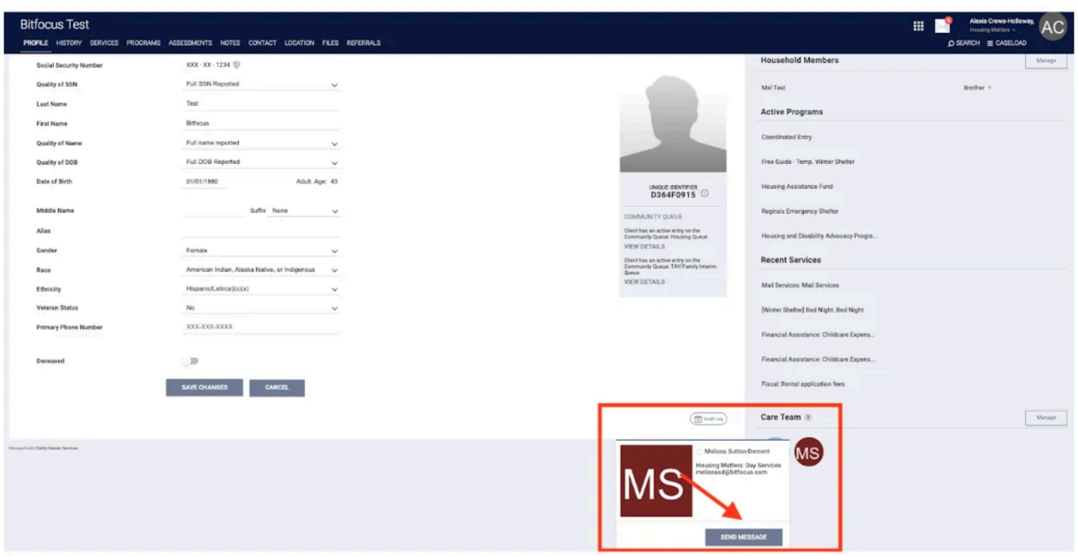
8 non-numeric characters in the SSN, the "Quality of SSN" field defaults to "Approximate or partial SSN reported" but is editable.

If you enter in all 0's for a client's SSN, the system will automatically replace the 0's with x's when you save the client's profile, and the "Quality of SSN" field also defaults to "Client doesn't know," but is editable.

# How-to

## Secure Messaging within the HMIS

Marin HMIS users can securely communicate with other Marin HMIS users via the internal messaging system. This is an easy way to reach out to and connect with other HMIS users about mutual clients - you don't even need to know their email address! The system keeps track of this for you. You just need to know what agency the HMIS user works for. You can even send a message directly to any staff listed under the Care Team section in the client profile with this shortcut.




Using the internal messaging system is an excellent and secure way to keep track of conversations and information, as well as build staff morale and collaboration while serving mutual clients. In addition, all system-wide messages will be included in this inbox. This is a completely secure messaging system, so you can reference real client names as opposed to their Unique Identifiers.

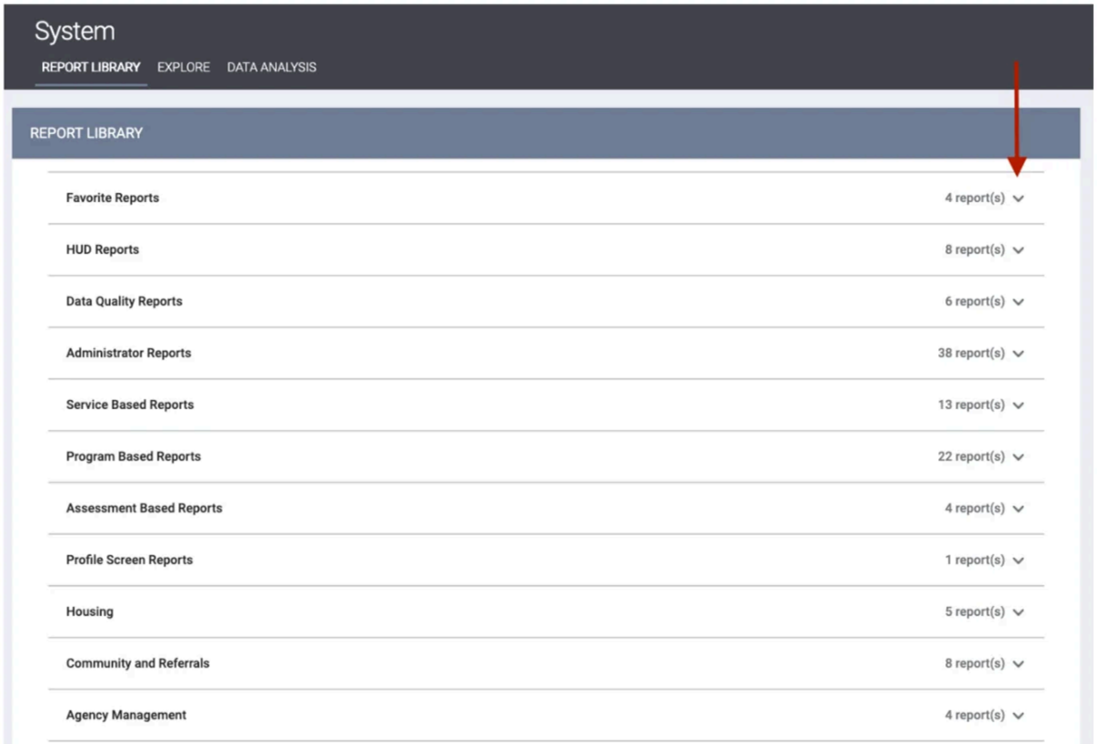
For step-by-step instructions on how to create new messages, access new messages, and reply to messages in your inbox, please visit the Help Center article "**The Staff Inbox and Secure Messaging**."

## Report Spotlight

### Using the Report Library

The ***Report Library*** contains all Bitfocus-maintained reports developed using the **Pentaho platform**. To access the *Report Library*, click the *Reports* icon from the *Launchpad*.

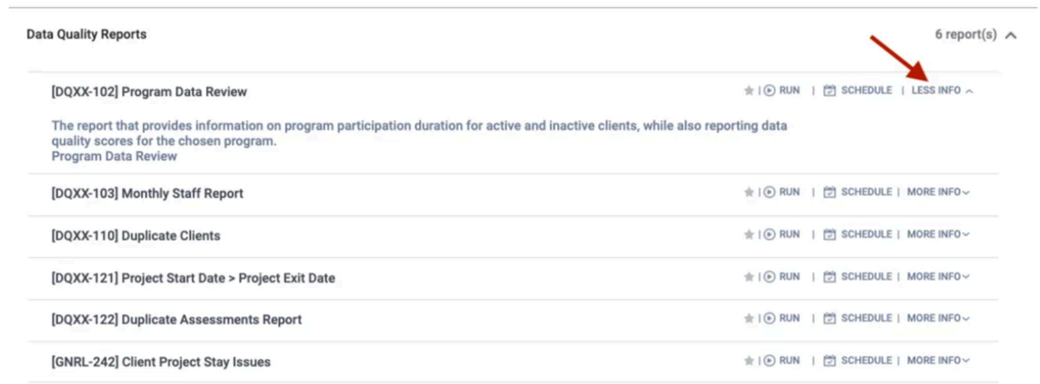

The *Report Library* contains sections for each report category. Selecting the down arrow to the report categories (right) expands that report section to show the reports within it.




Let's briefly highlight the most common report sections you may use, and some examples of what reports you will find in these sections:

- **Program Based Reports** contain all the standard reports you can run on your program(s), such as a Program Roster, Program Details, Client Demographics [Program Based], and Program Outcomes.
- **Service Based Reports** contain all the standard reports you can run on services, such as a Client List, Attendance by Days Served, and Service Expense Review.
- **Assessment Based Reports** contain all the standard reports you can run on assessments, such as Assessment Details Report.
- **HUD Reports** contain the federal reports required by HUD, such as the Annual Performance Report (APR), the PATH Annual Report, the ESG CAPER, and the HMIS Data Quality Report.
- **Data Quality Reports** contain reports that will help you assess data quality, such as the Program Data Review, Duplicate Clients, and Duplicate Assessments Report.

For more information on a particular report, click *More Info* (not all reports have this option). Clicking *More Info* displays a summary of the report and a link to associated Help Center content, where applicable.




## Favorite Reports

You can mark a report as a favorite by clicking the star icon.


These reports display in the *Favorite Reports* section of the *Report Library*.

### Client-Level Reports

**Client-level Reports are not housed in the Report Library.** Client-level reports live on each client profile. There are many different client reports that you may run. Anyone can run client-level reports, but results will be limited based on your access level.

**Here are a few client reports we'd like to highlight:**

- **Client History** - provides a history of services provided, program enrollments, and inventory-related assignments for the client for the selected reporting period.
- **Client Summary** - provides an overview of the client's history in the system.
- **Client Service Notes** - provides a list of service notes from selected services that were provided to the client during the reporting period.

To learn more about all the client-level reports that you may run, please visit our Help Center's "**Report Library**" and scroll down to the "Client Reports" section.

NEWS

## News

## Bitfocus is Hiring!

Bitfocus hiring for multiple positions! Check out our job postings **here**.

Apply today!

## Questions? Your HMIS Administrator is happy to help.

**Phone: 415-429-1400**
**Email: marin@bitfocus.com**