Welcome to the Santa Clara HMIS March 2025 Newsletter!

In this edition you'll find the following:

- Check Out This Fun Poll: **Do you prefer a written calendar or an electronic calendar for personal/home use?**
- Federal Reporting – HIC/PIT Updates
- Notes – Agency Level, Program Level and Service Level
- Release of Information (ROI) – Out With The Old In With The New!
- SCC Client Consent Training – Updates
- MyConnect SV – Video
- Report Spotlight - **[OUTS – 108] CE Demographics Report]**
- Resource Highlight
- Clients Assessed & Not on CHQ
- Meetings/Upcoming Events
- Bitfocus is Hiring!

Announcements

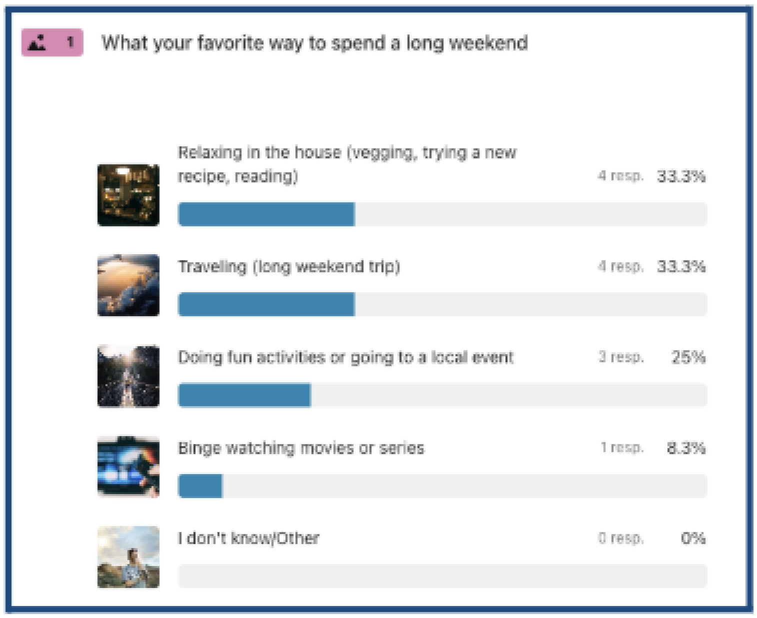
Check Out This Fun Poll

Do you prefer a written calendar or an electronic calendar for personal/home use?

Direct URL: https://bitfocus.typeform.com/to/QWTq3oic

We will share the results of this poll on next month's Newsletter.

Here are the results of last month's poll: **What is your favorite way to spend a long weekend?**



Click Here to Take the Survey!

Updates

Federal Reporting – HIC/PIT Updates

The date for the HIC this year was **Tuesday, January 21, 2025**. Reports run for Data Quality should focus on this date.

Email communications have gone out asking Agency Leads to review data as it pertains to:

1. Emergency Shelters NbN missing bed nights
2. Overlapping Enrollments
3. Missing HoH
4. Missing Move-in Dates

Please be sure and review your emails and be sure to correspond as needed. If you have any questions or need guidance, please refer to the **March Agency Lead slide deck** in which we provided further details on the data quality outreach taking place.

Useful Reports

- **[HUDX-225] HMIS Data Quality Report** to review data quality
  - **[GNRL-220] Program Details Report** to review all client-level data
  - **[GNRL-106] Program Roster** to review enrollment, exit, and housing move-in dates
- **[HSNG-108] Housing Census** to review bed nights and maximum bed occupancy

Next Steps

- Communication from your Sys. Admin. Team (**scc-admin@bitfocus.com**) for any required data clean-up and/or questions
- 1:1 Technical Assistance through the Help Desk via chat, email, phone, or zoom – **sccsupport@bitfocus.com**
- Standing Office Hours every other Thursday from 10:00-11:30 a.m.

Additional Resources: **PIT and HIC Guides, Tools, and Webinars**

News

Notes: Agency Level, Program Level & Service Level

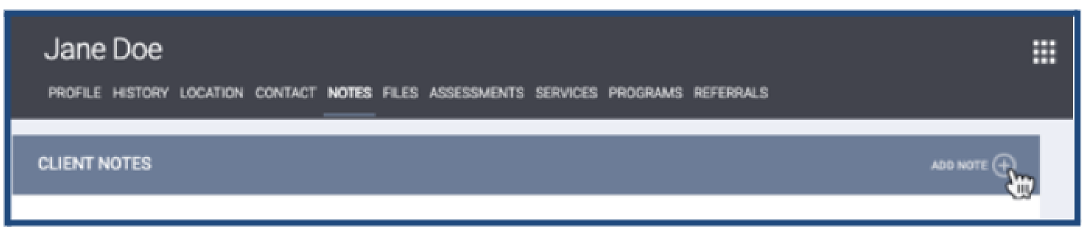
The NOTES tab provides a way for staff members to record and share notes in a dedicated space within the client record.

- When entering notes be sure to follow the guidance and workflow provided by your Agency Lead and/or Program Manager
- Keep in mind that a program workflow may require notes entered at a specific level
    - For example, you may not need to enter service notes, but you may be required to enter Agency Level notes
- If unsure, check in with your Agency Lead/Program Manager for further guidance

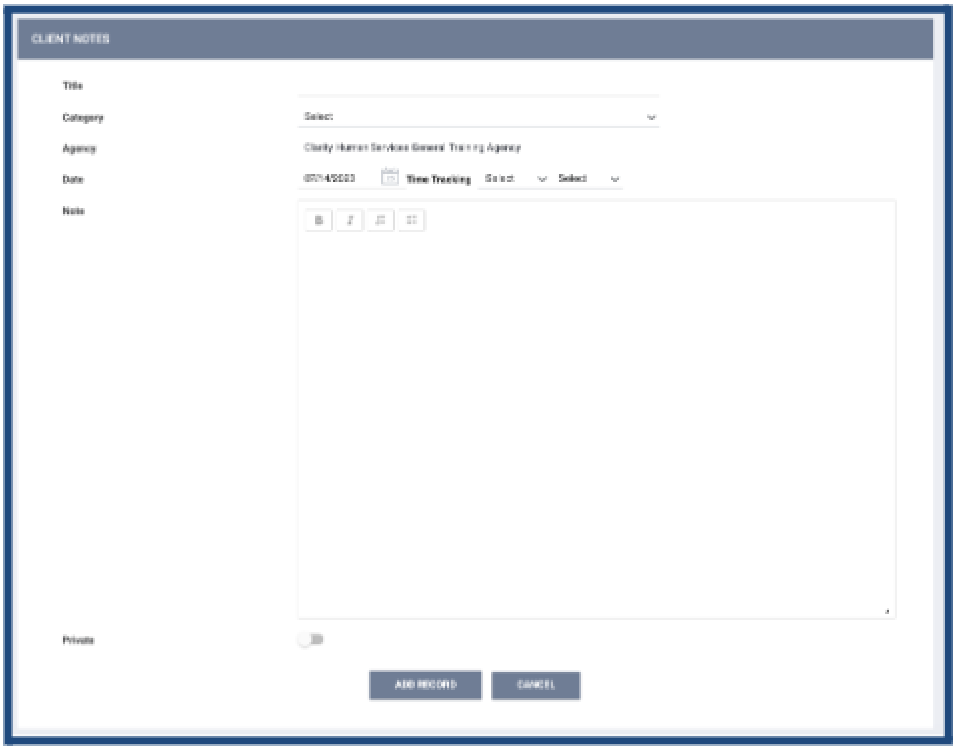
Reminder that Agency and Program notes are not shared across the CoC, which means you can only see notes for the Agency you have access to. Service Notes are viewable by all End Users.

Creating Client Notes -Agency Level

Notes at the Agency Level are notes that are entered from the dark grey shaded area in HMIS – directly located under the client's name.
To create a note, click the *NOTES* tab within the client record and click *ADD NOTE*.



The CLIENT NOTES page appears.



Continue reading

Updates

Release of Information (ROI) Out With the Old in With the New!

To access ROI information within an existing client record, click the **Client Privacy** shield icon, which navigates you to the PRIVACY page.

The Privacy section displays private data and Consent Refused options. Below that section is the RELEASE OF INFORMATION section, where any previously recorded ROI records are listed.

If the client’s current ROI has not expired, but you have reviewed the current ROI and noted changes, for example the client’s original ROI they did not want their photo taken, but now does, these merits updating the ROI.

1. With your mouse hover over the ROI that needs to be expired – select the Edit Tool
2. This will then open a new screen, update the end date of the ROI to 1 – day before the one that will replace the current ROI

a.) For example, the NEW ROI is dated 3/17/2025 – 3/17/2031

b.) The end date for this “old” ROI will be 3/16/2025

c.) Once you enter the date be sure to SAVE CHANGES

d.) Please note this will change the agency name of the original ROI to the agency you are switched into, this is OK and should proceed with updating the ROI

Another example is if a client’s ROI is about to expire, and you can’t upload a new one because the current one is still active then replace the ROI that is about to expire with the new ROI.

1. With your mouse hover over the ROI that needs to be expired – select the Edit Tool
2. This will then open a new screen, update the end date of the ROI to 1 – day before the one that will replace the current ROI

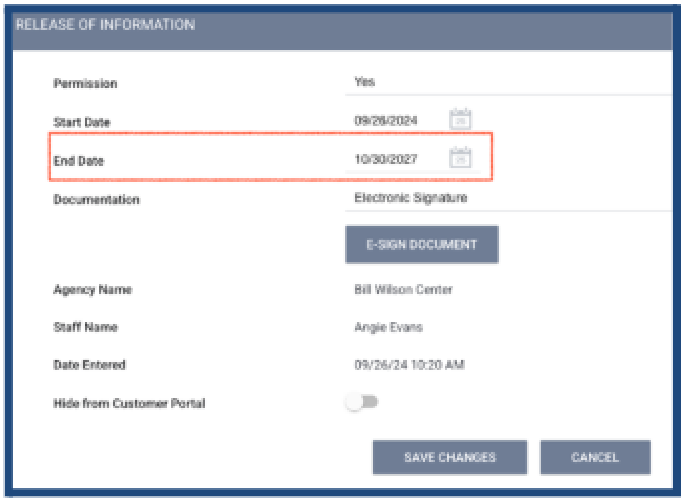
a.) For example, the NEW ROI is dated 3/17/2025 – 3/17/2031

b.) The end date for this “old” ROI will be 3/16/2025

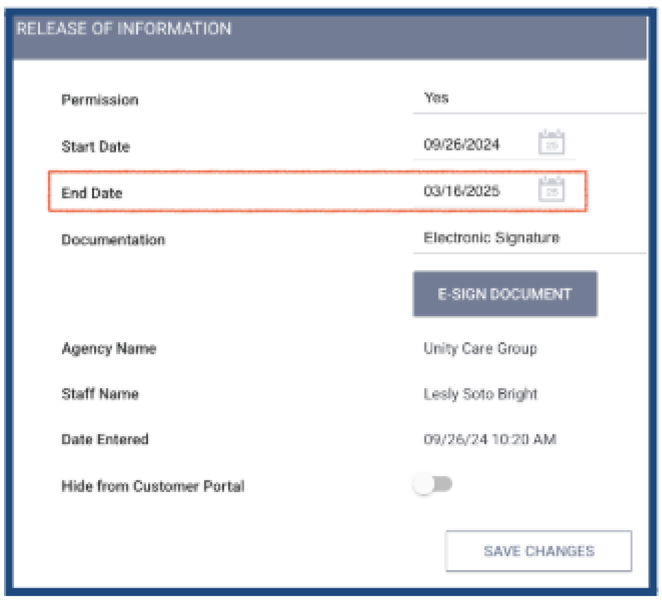
c.) Once you enter the date be sure to SAVE CHANGES

d.) Please note this will change the agency name of the original ROI to the agency you are switched into, this is OK and should proceed with updating the ROI

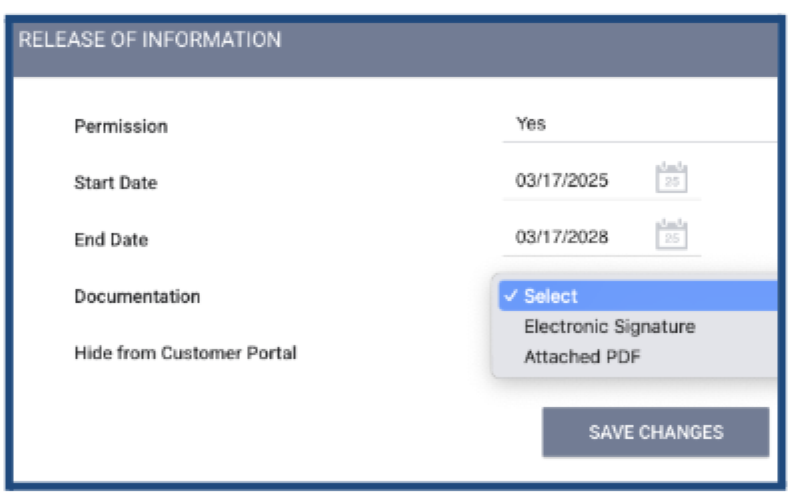
Here is the OLD ROI – note the End Date



Here is the revised end date for the old ROI – note the End Date



Now that the end date has been adjusted. You can upload the new ROI by adding the **ADD RELEASE OF INFORMATION**. Follow the prompts and upload the appropriate *revised* ROI.



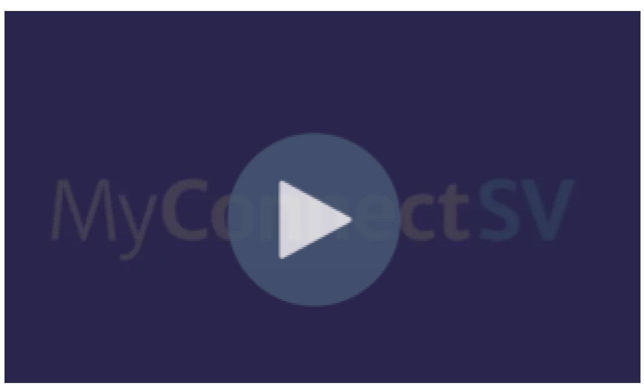
Training

SCC Client Consent Training – Updates

- Is the Client Consent Training still happening? Yes, it is, but the date is TBD as we continue to finetune the training content.
- Will I be informed when it is available? Yes, you will. It will be announced at the Agency Leads meeting and/or via an email communication.
- What can I expect? As before this training will take at least 45 minutes of your time. You will need to complete a Quiz and score 80%. Non-completion will result in HMIS deactivation.
- How much time will I be giving to complete the training? You will have at least three weeks for training completion.

News

MyConnect SV – Video!



MyConnectSV can help service participants at every stage of their housing journey.

- No matter where participants are in their housing journey, MyConnectSV can help

- Take a minute to watch the short video at the top of the page, which will walk you through MyConnectSV's key care-empowering features.

Report Spotlight

[OUTS – 108] CE Demographics Report

This is an assessment-based report that provides a way for communities to understand the demographics of the people served by the coordinated entry system.

Running the Report

This report can be found in the following locations in the Report Library:

● Assessment Based Reports → [OUTS-108] CE Demographics Report

● Administrator Reports → [OUTS-108-AD] CE Demographics Report

Who Can Run the Report

All users may run the report. There are restrictions for which information can be accessed based on the rights of the user.

Continue reading

Updates

Clients Assessed and Not on the Community Housing Queue (CHQ) Dashboard – Update

List of Agencies with Clients Assessed and Not on the CHQ Please note this report was run on Thursday, February 27, 2025. **Click here** for directions to run this report yourself.

Agency	Client Count
Bill Wilson Center	7
City of San Jose	1
CityTeam Ministries	1
Community Services Agency of Mountain View	2
Community Solutions	1
County: OSH	1
County: SCVHHS - Ambulatory	5
County: SCVHHS - BHSD	2
HealthRIGHT 360	1
HomeFirst	6
Institute on Aging	2
LifeMoves	6
Mission Possible	4
PATH	5
San Jose State University Research Foundation (SJSU)	1
Social Impact Team (SIT) | Property Owners Downtown Association	1
The United Effort Organization	1
UPLIFT	2
VAPAHCS	1
WeHOPE	3
West Valley Community Services	1

News

Resource Highlight – Help Bitfocus – Report Library

Ever wondered what reports are available in HMIS? Or have you ever been curious about what exactly a report pull means and what it includes? You're not alone.

The Report Library is a fantastic resource that houses most of the reports in HMIS. If you're unsure about what's in a specific report, you can always look it up and get the details you need!

Report Library

Find detailed information about reports, including the source of each data point as well as guidance on drill-down functionality and parameters.

Introduction

Pentaho 101
The Report Library
Running Reports
Scheduling Reports
Privacy and Sharing Logic for Reports
Parameter Spotlight: Client ID Selection

Administrator Reports

[DQXX-105-AD] Monthly Agency Utilization Report
[DQXX-106-AD] VI-SPDAT - Centralized Intake Dashboard Report
[DQXX-120-AD] Project Households with issues in HoH determination
[GNRL-108-AD] Chronic Homeless Program Enrollments
[GNRL-110-AD] VIP List
[GNRL-117-AD] Client Assessment Score
[HUDX-234-AD] HMIS Statistics Report
[STFF-102-AD] Access Role User List
[STFF-105-AD] License Utilization
[UNIT-101-AD] Unit Configuration Report
[RFRL-150-AD] Community Queue Query

Agency Management Reports

[STFF-101] User Activity Report
[STFF-103] User Active Caseload
[STFF-104] Staff Client Data Activity
[STFF-104] Specification Details
[STFF-106] User Client Note Hours Tracked

Upcoming Events

Meeting/Upcoming Events

HMIS Technical Administrator (TA)/Agency Lead Meeting

When: Thursday, April 3, 2025

Time: 2:00 - 3:30 p.m.

Where: **Zoom**

This meeting, formerly known as the Agency Admin meeting, will discuss the reports and data collection requirements in HMIS. This naming convention change does not alter the content, requirements, or attendees of the meeting. Please send an agency representative to this meeting who is responsible for supporting staff in their HMIS data collection responsibilities.

Santa Clara County Homelessness CoC Serving Older Adults Training

When: Thursday, April 3, 2025

Time: 11:00 a.m.-12:30 p.m.

Where: Zoom

Data Think Tank

When: Thursday, April 8, 2025

Time: 10:00 -11:00 a.m.

Where: Zoom

Service Providers Network Meeting

When: Wednesday, April 9, 2025

Time: 9:30 – 11:00 a.m.

Where: Zoom

Santa Clara County Homelessness CoC - Fair Housing

When: Wednesday, April 9, 2025

Time: 10:00 a.m.-12:00 p.m.

Where: Zoom

2025 NOFO Committee Meeting

When: Thursday, April 17, 2025

Time: 2:00 -3:30 p.m.

Where: Zoom

2025 PMWG

When: Thursday, April 24, 2025

Time: 1:00-2:00 p.m.

Where: Zoom

SCC CoC VI-SPDAT In-Person Training

When: Monday, April 28, 2025

Time: 9:00 a.m. – 1:00 p.m. (In-Person)

In-Person: 110 W Tasman Drive, San Jose, CA 95134

Where: Register Here!

SCC TA Office Hours

When: Wednesday, April 30, 2025

Time: 10:00 -11:00 a.m.

Where: [Zoom](#)

Training

Check out these April training offerings.

SCC Clarity Office Hours

When: Thursday, April 10 and 24, 2025

Time: 10:00 -11:30 a.m.

Where: Zoom

SCC Looker Office Hours

When: Monday, April 14 and 28, 2025

Time: 2:00 - 3:00 p.m.

Where: Zoom

News

Bitfocus is Hiring!

Check out all the great career opportunities at Bitfocus!

Click here to learn more!

Questions? Your HMIS Administrator is happy to help.

Phone: 408.596.5866 Ext. 2
Email: sccsupport@bitfocus.com