



Santa Cruz HMIS News

October 2024

Welcome to the Santa Cruz HMIS October 2024 newsletter!

In this edition you'll find the following:

- Upcoming Events
- 2024 Federal Reporting Season - Coming soon!
- The Next Generation of Clarity Human Services
- Data Quality Dashboard and Report Content
- Friendly Reminder: HMIS Screen and Form Updates
- Spotlight Report: Housing Move-In Date
- We Welcome Your Ideas



Upcoming Events

Upcoming Events

Housing for Health - HMIS Office Hours

Monday, November 25 | 1:00 - 2:30 p.m. | Register [HERE](#)

Housing for Health and Bitfocus host office hours every **fourth Monday of each month** (in lieu of HMIS Workgroup meetings). Drop-in for as long or as short as

you'd like to ask any and all questions related to the HMIS. All users are welcome. Please join us within the first 15 minutes or we will assume nobody will be joining us for Office Hours.



News

2024 Federal Reporting Season - Coming soon!

The 2024 federal reporting season is fast approaching! Prep for two of HUD's major CoC reports began in October: the Longitudinal Systems Analysis (LSA) and System Performance Measures (SPM).

HUD's **Longitudinal Systems Analysis (LSA)** is a report submitted to HUD annually that includes a complex analysis across key projects participating in the Continuum of Care (CoC) Homelessness Management Information System (HMIS). The LSA replaced the Annual Homeless Assessment Report's (AHAR) data component in the 2018 reporting year.

HUD's **System Performance Measures (SPM)** focus on evaluating local homeless responses as a coordinated system of homeless assistance options. This data is reported to HUD annually and includes key indicators of a high performing system including length of time homeless, exits to permanent housing, returns to homelessness, and more.

What Can Your Agency Do to Prepare for LSA and System Performance Measures?

The Bitfocus team may reach out to verify or correct data about your program and/or clients. Please look out for those emails and respond promptly. We truly appreciate all of the hard work your community does to maintain data that is complete, accurate, and timely!

Additionally, we are asking all Agency Leads to start reviewing your agency's data.

You can review your data by doing the following:

1. **Run the [HUDX-225] HMIS Data Quality Report for the period 10/1/23 to 9/30/24** (you'll find this report in the Clarity Human Services Report Library under HUD Reports). Correct records with errors, paying special attention to any element that shows over a 5% error rate (remember, clicking on a number will give you a list of clients being counted in that number). Want more information on what gets counted in this report? Check out our Help Center article: [\[HUDX-225\] HMIS Data Quality Report](#)

2. **Run the [GNRL-106] Program Roster for the period 10/1/23 to 9/30/24** (this report is under Program Based Reports) and make sure household groups are correct (households are separated by bold lines. Clients not separated by lines are grouped together in a household). If you notice that clients are missing, check out our Help Center article: [How do I add a new household member to the Program?](#) If clients are grouped together incorrectly, [contact the Helpdesk](#) to get them corrected. Some measures only count heads of household, so it's important that households be configured correctly! Check out our Help Center article: [\[GNRL-106\] Program Roster](#).

3. **Run the [GNRL-220] Program Details Report for the period 10/1/23 to 9/30/24** (this report is under Program Based Reports) and review the following:
 - **Date of Birth:** Some measures only count adults, so it's important that dates of birth be as accurate as possible.
 - **Housing move-in date:** Make sure this date is on or between the client's project start and exit dates, otherwise it will look like clients were never housed by your project!
 - **Income and non-cash benefits:** Be sure these are/were updated before client exit. Increase in income/benefits is one of the areas in which communities are measured.
 - **Living situation (including prior residence and length of time homeless):** Make sure these fields are as complete as possible with no "Client doesn't know," "Client prefers not to answer," or "Data not collected" values when possible. These elements impact measures around entries from homelessness.
 - **Exit destination:** Avoid choosing "Client doesn't know," "Client prefers not to answer," or "Data not collected" values whenever possible. This

element impacts measures around returns to homelessness.

- Check out our Help Center article: [\[GNRL-220\] Program Details](#)

4. **Review Bed Inventories and Utilization rates for accuracy.** Ensure an accurate number of beds and units are listed throughout the year for your shelter and housing programs. Utilization rates should be between 90-105%. For Night-by-night (NbN) Shelters, please resolve any missing exits or abandoned enrollments.

What Else Should You Know About LSA and SPM Preparation?

The best people to review the data are program managers and key staff who work in the programs. There is overlap with the LSA and SPM timeline and relevant data. Your work on this will benefit both reports, and more broadly, your CoC.

Thanks in advance for your help in ensuring that our community's data are as accurate as possible!



Announcements

Next Generation of Clarity Human Services New Look!

In September we launched The Next Generation of Clarity Human Services and we hope you've had a chance to explore it. This update is much more mobile friendly for entering data via tablets or phones. It also is easier to see the steps or "workflow" for entering data to help staff enter all required data along the way. What's included in the new interface?

The September launch focused on the client module, including:

- Client search, enrollment, and exits
- Adding clients, ROIs, services, notes, and assessments
- Managing households

New features will be added as part of our regular release schedule.

Get Familiar with the New look and Practice

- **Watch the [15-minute recording](#)** to walk through the key changes in Clarity Human Services.
- **Practice:** Use our [Interactive Common Functions Tool](#) to get hands-on experience
- **More Videos:** Get comfortable with the new design and features by following each of the practice steps below:
 - [Search for a client](#)
 - [Add a new client](#)
 - [Add a family member](#)
 - [Enroll a client](#)
 - [Add a family member to an enrollment](#)
 - [Provide a service to a client](#)
 - [Provide an assessment to a client](#)
 - [Exit a client](#)

Watch the Clarity Human Services: New Interface Training and **Review** the Screenshot Library.

- [Clarity Human Services: New Interface Training](#)
- [Screenshot Library](#)

You may also visit the [New Clarity Human Services Interface](#) section of our Help Center for a collection of Help Center articles on the new user interface. Don't forget that you have access to the [Santa Cruz Training Site](#) should you prefer to familiarize yourself with the new User Interface in the training site first.

Use the pop-out icon to switch between the old and new interfaces as needed.



If you run into any software issues using the new User Interface, please reach out to the Help Desk:

Email: santacruz@bitfocus.com

Call: 831-713-2288

Chat: Directly from the [Santa Cruz HMIS Support Website](#) or when logged into your HMIS account (from the Client Search screen - chat widget at the bottom right corner)



Updates

Data Quality Dashboard and Report Content

Please see the pictures below for the agency-level data quality dashboard and report content updates. This is updated monthly - check it out!

Data Quality

- Completeness – data is complete
- Timeliness – data is entered timely
- Accuracy - data is entered accurately
- Consistency – data is consistent , no contradictions of data

Why is Data important?

- Data is used to drive the decision-making process of how funding is allocated.

```

graph LR
  G([Garbage]) --> DB[Database]
  AD([Accurate Data]) --> DB
  DB --> SG([Sorted Garbage])
  DB --> AI([Actionable Insight])
  
```

*HUD Data Quality Toolkit

Continue reading

News

Friendly Reminder: HMIS Screen and Form Updates

As a reminder, on October 1, 2024, updates were made to the HMIS screens and paper forms. This is part of a local initiative to add more context to the screens (additional warnings, labels, and updated display names) to make your data entry work easier and more understandable. We have added a lot of clarification to the screens - particularly within the following sections: Prior Living Situation, Survivor of Domestic Violence, Monthly Income and Sources, Non-Cash Benefits, Health Insurance, and Last Permanent Address.

As a helpful reminder, we have listed the state-specific naming conventions for the following federally-funded programs you see on the Program Enrollment, Status Update/Annual Assessment, and Exit screens:

In the **Monthly Income and Sources** section:

- **Temporary Assistance for Needy Families (TANF)** is the federal program name for California's **CalWORKs** program. If the participant receives CalWORKs funds, please select TANF in the Monthly Income and Sources section.
- **Social Security Income (SSI)** is for participants who are disabled *without* a significant work history.*
- **Social Security Disability Insurance (SSDI)** is for participants who are disabled *with* a significant work history.*

In the **Non-Cash Benefits** section:

- **Supplemental Nutrition Assistance Program (SNAP)** is the federal program name for California's **CalFresh** program. If the participant receives CalFresh benefits, please select Supplemental Nutrition Assistance Program (SNAP) in the Non-Cash Benefits section.
- Just like in the Income section above, **TANF** is the federal program name for California's **CalWORKs** program. Any time you see TANF, this is referring to CalWORKs: TANF Childcare Services, TANF Transportation Services, Other TANF-Funded Services.

In the **Health Insurance** section:

- **Medicaid** is the federal program name for California's **Medi-Cal** program. If the participant has Medi-Cal health insurance, please select Medicaid in the Health Insurance Section.

**While the names for these federal programs do not have CA-state specific names, we know that the difference between SSI and SSDI is often confusing to both HMIS users and participants. Participants may not always know which one they are receiving, so it is always important to confirm this with your participants.*

Additionally, the updates we made to the **Last Permanent Address fields** are to collect better data on the region/area that the client last had permanent housing in (as opposed to their address when they were last in permanent housing). **We will be removing the current Last Permanent Address fields on the enrollment screens AND from the Housing Needs Assessment.** The Housing Needs Assessment will still have Question 13: Any adult household member's most recent housing was in Santa Cruz County.

We will be adding new fields to the enrollment screens to capture this data instead. If the client last lived in Permanent Housing in California, and specifically in Santa Cruz County, the questions on the enrollment screen will look like this:

LAST PERMANENT ADDRESS

⚠ Please ask the client about the location of their last permanent housing prior to this episode of homelessness. Do not include information on the location of where they last stayed in an unsheltered situation such as at a shelter or place not meant for human habitation (for example in a car, on the streets, or at a park).

What state did you previously live in permanent housing? California ▼

If the last state you lived in permanent housing was California, what California county were you living in? Santa Cruz County ▼

⚠ Santa Cruz County regions:

North County

- Unincorporated Areas (e.g., Felton, Ben Lomond, Davenport, other)
- City of Santa Cruz
- City of Scotts Valley

Mid-County

- Unincorporated Areas (e.g., Live Oak, Soquel, other)
- City of Capitola

South County

- Unincorporated Areas (e.g., Aptos, La Selva, Corralitos, other)
- City of Watsonville

If the last place you lived in permanent housing was in Santa Cruz County, what part (region) of Santa Cruz County did you live in? Select ▼

If the client did **not** last live in Permanent Housing in California, or they did live in California but not Santa Cruz County, the questions will stop there.

To access the new HMIS paper forms, please visit the [Santa Cruz HMIS Support Website](#) and use the forms that are most applicable to your program.



Report Spotlight

Housing Move-In Date

One of the most important and complex HUD HMIS data elements is *Housing Move-in Date* (3.20). This article will explain some of the fine points and nuances regarding the usage of this element in HUD and Federal Partner reporting.

Some of the reports where *Housing Move-in Date* calculations are relevant include:

- Annual Performance Report [HUDX-227]
- ESG CAPER [HUDX-228]
- System Performance Measures [HUDX-223-AD]
- Longitudinal System Analysis [HUDX-231-AD]*
 - *LSA has additional logic outside of this overview for adjusted move-in dates per the specifications.*
- Housing Inventory Count [HUDX-123-AD]
- Shelter Count PIT [HUDX-230-AD]

Additionally, Bitfocus has implemented the same logic into other "canned" reports requiring *Housing Move-in Date* as part of the report logic.

The Basics

The following is an overview of the minimal requirements for counting an enrollment as having a *Housing Move-in Date*. Additional rules and guidance for handling *Housing Move-in Dates* are outlined in the [HMIS Standard Reporting Terminology Glossary](#) and worked into move-in date calculations.

Screen Type

The *Housing Move-in Date* is only taken from *Program Enrollment Screens* of the enrollment's *Head of Household*. If a program captures *Housing Move-in Date* on a different screen, it will not be included in reporting on *Housing Move-ins*.

Project Type Code

The enrollment must be in one of the following project types:

- PH - Permanent Supportive Housing
- PH - Housing Only
- PH - Housing with Services
- PH - Rapid Re-Housing

Pay for Success Programs: Due to the nature of some Pay for Success programs, *Move-in Date* is collected and utilized for reporting in the APR, CAPER, CSV/XML Export, and Program Roster.

Head of Household

- The enrollment must have one and only one *Head of Household* designated.
- The HoH entered the project on or before the date, all other household members entered.
- A *Move-in Date* is required for the HoH.

Housing Move-in Date in Relation to Other Dates

- The *Move-in Date* must be on or between the HoH's Project Start Date and Project Exit Date.
- The *Move-in Date* must be before the reporting period end date.
- The *Move-in Date* that is prior to the HoH's Project Start Date, should be disregarded entirely and handled as null.
- The *Move-in Date* that is after the Reporting End Date should also be disregarded and handled as null.

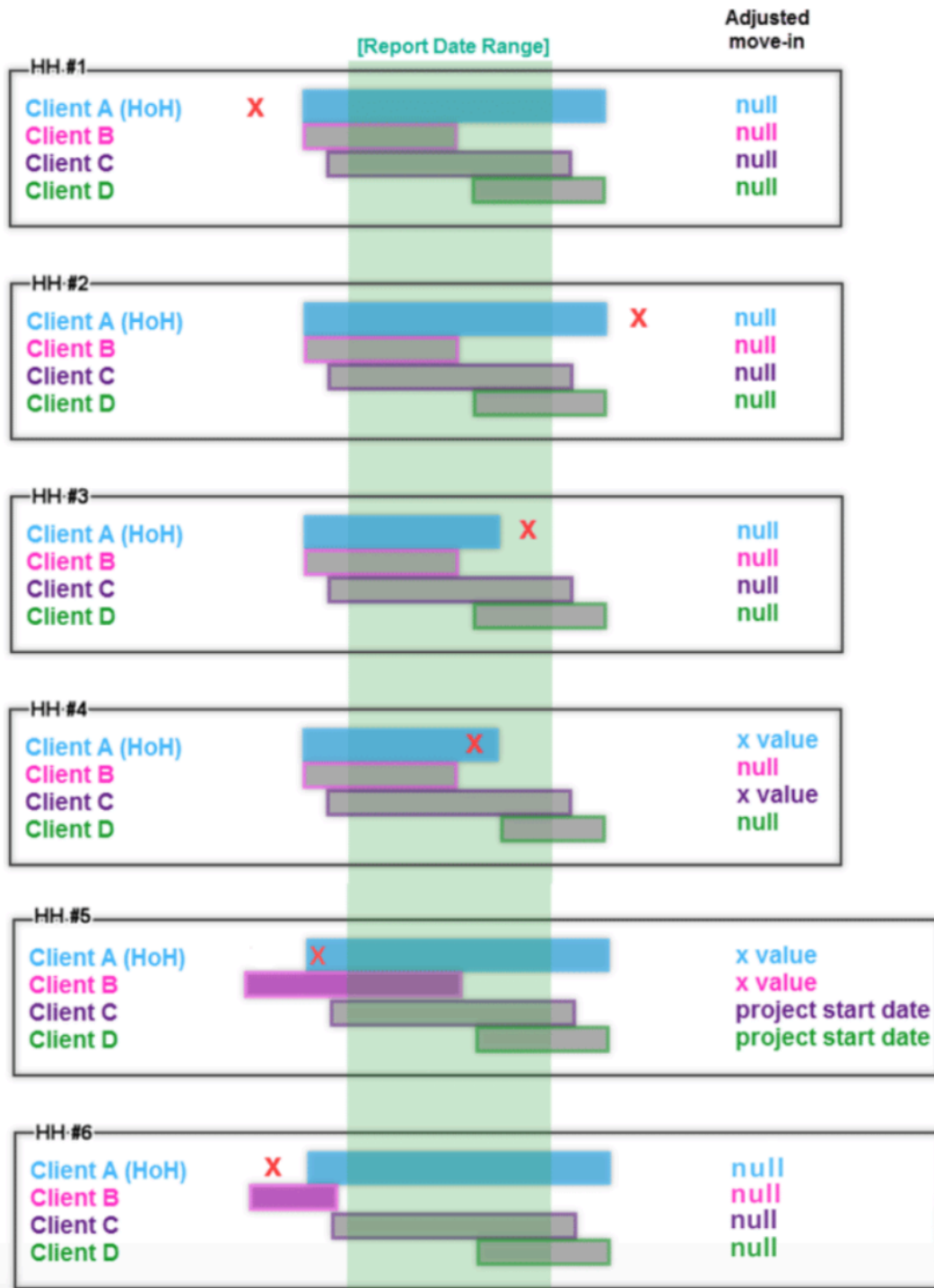
Household Members

- If a household member's Project Start Date is before or on the HoH's Move-in Date, the HoH's Move-in Date will be applied to the household member for reporting.
- If a household member exits prior to the HoH's Move-in Date, the Move-in Date is not inherited.
- If a household member's Project Start Date is after the HoH's Move-in Date, the household member's Move-in Date will be the same as their Project Start Date.

Variations

Often, reality does not conform to the ideal standards. As a result, some specific alternate situations are visually summarized below:

x - HoH move-in date on enroll screen



News

We Welcome Your Ideas

We encourage you to suggest improvements and new features for our products. You can [create feature suggestions](#) or vote, watch, and comment on existing suggestions at ideas.bitfocus.com. Refer to our [Feature Suggestions](#) article for additional details.

Questions? Your HMIS Administrator is happy to help.

Phone: 831-713-2288

Email: santacruz@bitfocus.com



Bitfocus, 5940 S Rainbow Blvd, Ste 400 #60866, Las Vegas, NV 89118, United States, 800-594-9854

[Unsubscribe](#) [Manage preferences](#)