

# Wake County – Agency Administrators Monthly Meeting

February 2025



# Ice Breaker!

What is your favorite way to unwind after a long workday or work week?



# Agenda

Privacy and Security Training

Federal Reporting: SPM, HIC/PIT

February Feature Updates

Public Alerts

# Privacy and Security Training Recertification

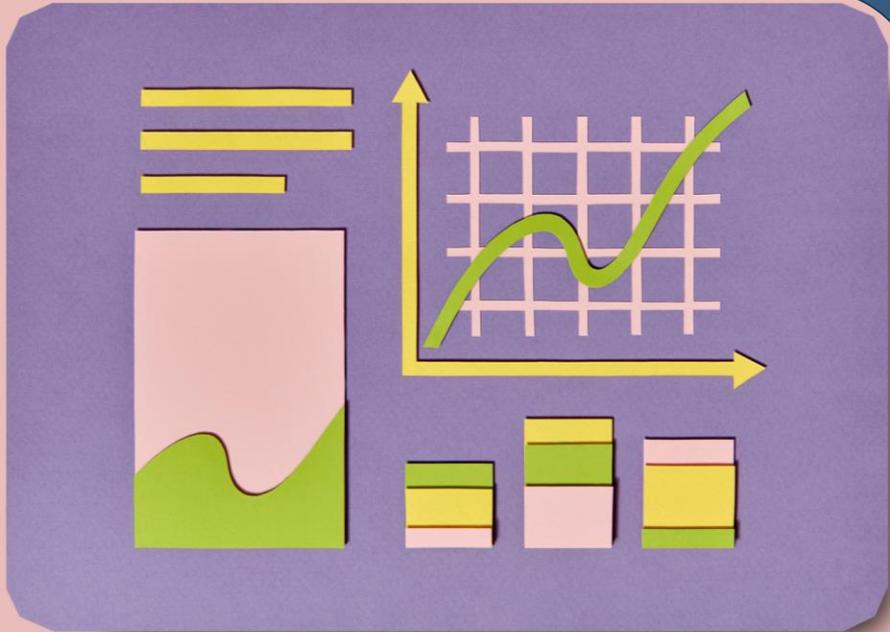
- **Deadline: Friday, February 28 @ 12p EST**
- Users who have not taken the training will need to take the training to have their account reinstated after the deadline.



**Users email in the LMS must match the email used in Clarity HMIS.**



# Federal Reporting



- Federal Reporting is TBD per HUD.
- Still continuing work on the SPM and HIC/PIT.

Next Steps: Bitfocus will be reaching out for the HIC/PIT and Data Quality.

# February Feature Updates

- Social Security Number Masking
  - Pentaho Reports Update
- Social Security Number “Pop Up” Functionality

# Social Security Number (SSN Masking)

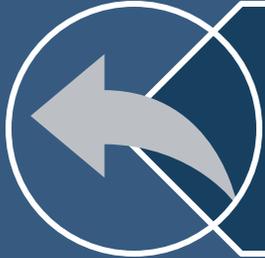
Previous	Issue	Solution	Reporting
SSNs were masked using "X."	Non-numeric values are accepted entries for partial SSNs.	Mask SSNs with an asterisk	All impacted reports have been updated to mimic masking updates for SSNs.

CLIENT PROFILE

Social Security Number \*\*\* - \*\* - 98xx 

Quality of SSN Approximate or partial SSN reported

# Social Security Number Pop-Up Functionality



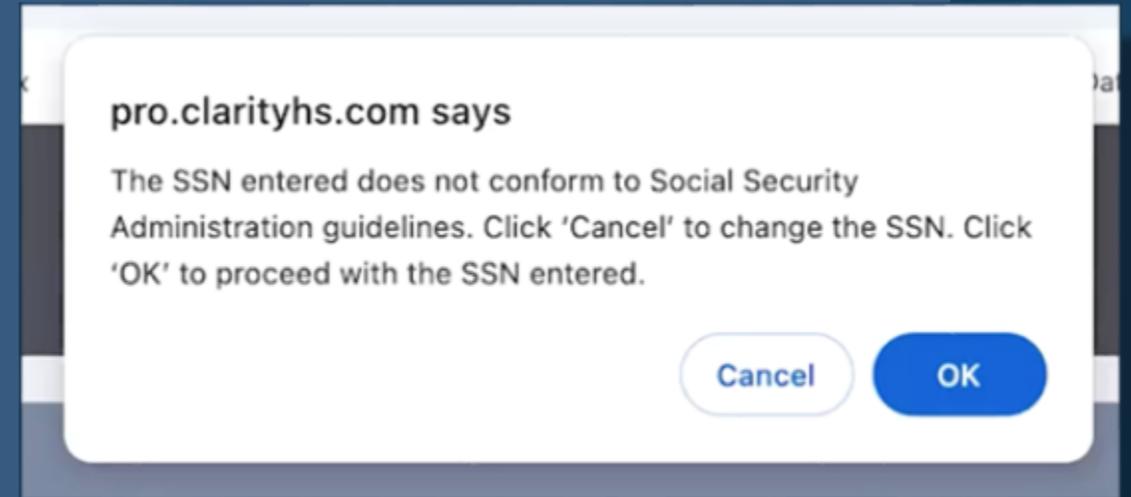
**Previous:** Pop-up occurred for non-numeric inputs



**Issue:** Non-numeric values are accepted entries for partial SSNs.



**Solution:** Pop-up no longer appears for valid SSN entries



# Public Alerts



Public Alerts provide a way to direct users to important information within a client record by displaying an alert



In the client record, Public Alerts appear as a gold banner across the top of the client profile



Public Alerts can only be edited/changed by a user from the same agency as the one that created it

CLIENT PROFILE

 **Public Alert:** This client has been issued system-wide alert. Please review notes for full details.

[REVIEW NOTES](#)

# Public Alerts: Keys Points

01.

Stick to facts

03.

Use neutral language

02.

Protect Privacy

04.

Be clear and concise; a long note may not be read

# Public Alerts: How to Use Them



Indicate A Client's  
Contact  
Information Has  
Changed



Indicate a BOLO  
(Be On the  
Lookout) has been  
issued to locate  
the client



Inform other users  
who view the  
client's profile  
that an important  
deadline is  
approaching



Announce When  
A Client Has Lost  
An Item And/Or  
An Item Belonging  
To The Client Has  
Been Found



# Public Alerts: What Not To Do

Share Physical Health Or  
Behavioral Health Details  
About A Client



Share Criminal History  
Details About A Client



Share Information About  
Other Clients



# Public Alerts: How to Add

The screenshot shows the 'Blue Sky' client profile interface. At the top, a navigation menu includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The 'NOTES' tab is highlighted with a red box. Below the navigation is a yellow warning banner: 'Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.' The main content area is divided into two sections: 'CLIENT NOTES' and 'PUBLIC ALERTS'. Both sections show a 'No results found' message with a placeholder icon. The 'ADD NOTE +' button is visible in the 'CLIENT NOTES' section, and the 'ADD ALERT +' button is visible in the 'PUBLIC ALERTS' section. A red arrow points from the 'NOTES' tab to the 'ADD ALERT +' button.

1. From the client's profile screen, click on the **NOTES** tab.
2. Then click on the "Add Alert +" button to start a new alert.

# Public Alerts: How to Add

1. You can edit the following items for the public alert:
  - Title
  - Expiration Date (required)
  - Note
2. The *agency* will **default to the Agency you are under** and cannot be changed.
3. Click “Save Changes” to add the alert.

PUBLIC ALERTS

Title	Client is matched to a housing resource that will expire soon.
Agency	System
Expiration Date	03/02/2025 
Note	<p><b>B</b> <i>I</i>  </p> <p>The client has been matched to a PSH Program, and the opening to this resource will expire on 03/01. Please have them contact their case manager, Nancy Drew, at 555-5555.</p>

# Questions?



# For Support:

Bitfocus Help Desk Support:

Email: [support@bitfocus.com](mailto:support@bitfocus.com)

Phone: 800.594.9854 x1

Bitfocus Community Administrators

Email: [wake-admin@bitfocus.com](mailto:wake-admin@bitfocus.com)