



**SCC Technical Admin. (TA)
Agency Lead Meeting
Thursday, May 7, 2026**



Getting to Know You



Discussion Topics

UPDATES



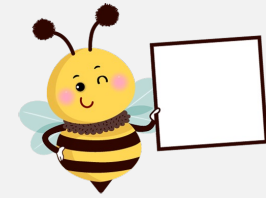
- ❖ CoC Updates
- ❖ UPLIFT Updates
- ❖ HMIS Newsletter

IN THE KNOW



- ❖ HIC/PIT
- ❖ SCC Annual Client Consent & MyConnectSV Training
- ❖ User Satisfaction Survey
- ❖ May PMWG
- ❖ Disabling Condition "Warning"
- ❖ SCC Quarterly Compliance Checklist

MEMOS



- ❖ Recently Assessed & Not on CHQ
- ❖ Q & A Time
- ❖ Next Month's Meeting



UPDATES



COC UPDATES



CoC Updates – *Community Plan to End Homelessness*

We are in the community input phase of drafting the next iteration of the CPEH.



We will seek community input on the draft plan from March - May to have a final plan approved and implemented this Summer.



We want to hear from you, your colleagues, and your clients.



Huge thank you for those who participated in any of the 3 convenings last week in Gilroy, Palo Alto, and Campbell! We had a great turnout of service providers, community members, people with lived experience, and many other partners.

CoC Updates – *Community Plan to End Homelessness*

We have two convenings available in May!

Please share with your networks!



COME IN PERSON:
Thursday 5/14, 6-8PM at Roosevelt Community Center in San Jose

(901 East Santa Clara Street, San Jose, CA 95116)

Register here: [Santa Clara County Community Plan to End Homelessness](#)



\$70 gift card provided for community members who are currently experiencing, have previously experienced, or are at risk of homelessness.

Light snacks and beverages.

Spanish, Mandarin, & Vietnamese interpretation available



Virtual Option

Thursday 5/21

1-2:30pm

[Join & Register here](#)

May 2026

MON	TUES	WED	THURS	FRI
				1
4	5	6	7 <u>10am SCC Clarity Office Hours</u> <u>HMIS Technical Administrator (TA)/Agency</u> <u>Lead Meeting</u>	8
11 <u>2pm SCC Looker Office Hours</u>	12 <u>10am Data Think Tank</u>	13 <u>9:30am Service Providers Network</u> <u>Meeting</u>	14	15
18	19	20	21 <u>10am SCC Clarity Office Hours</u>	22
25 Bitfocus is CLOSED - Memorial Day Holiday	26 9am SCC CoC VI-SPDAT Training Register for VI-SPDAT Training HERE RESCHEDULED FOR JUNE	27	28 <u>1pm SCC Performance Management Work</u> <u>Group</u>	29



UPLIFT UPDATES



UPLIFT Updates

We are still processing the last batch of UPLIFT passes

No more UPLIFT passes are available currently

If any passes are returned to us, we will notify case managers on the waitlist

Please do not submit any new requests on HMIS

HMIS NEWSLETTER



HMIS Newsletter

HMIS Newsletter: April 2026

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 - ✓ [Bitfocus is Hiring](#)
-





IN THE KNOW



FEDERAL REPORTING

HIC/PIT DQ





*Never underestimate the
difference you make and
how truly appreciated you
are!
Thank you!*



REQUIRED ANNUAL TRAINING



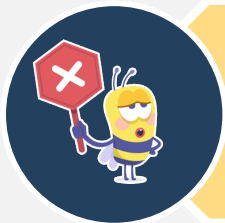
Annual Client Consent Training



End Users should have received a notification via email to commence the SCC Client Consent Training 2026



Tuesday, May 19 EOB, is the deadline to complete the training - *this includes TA/Agency Leads and anyone who uses HMIS*



End Users that **DO NOT** complete the training will have their **access deactivated!**



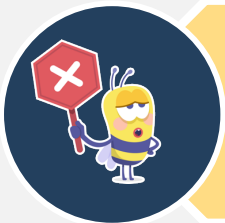
NEW! MyConnectSV Training



End Users should have received a notification via email to commence the MyConnectSV Training 2026



Tuesday, May 19 EOB, is the deadline to complete the training - *this includes TA/Agency Leads and anyone who uses HMIS*



End Users that **DO NOT** complete the training will have their **access deactivated!**



Training Completions



508

SCC Client Consent Training 2026

312

MyConnectSV Training (From April to today)



USER SATISFACTION SURVEY 2025



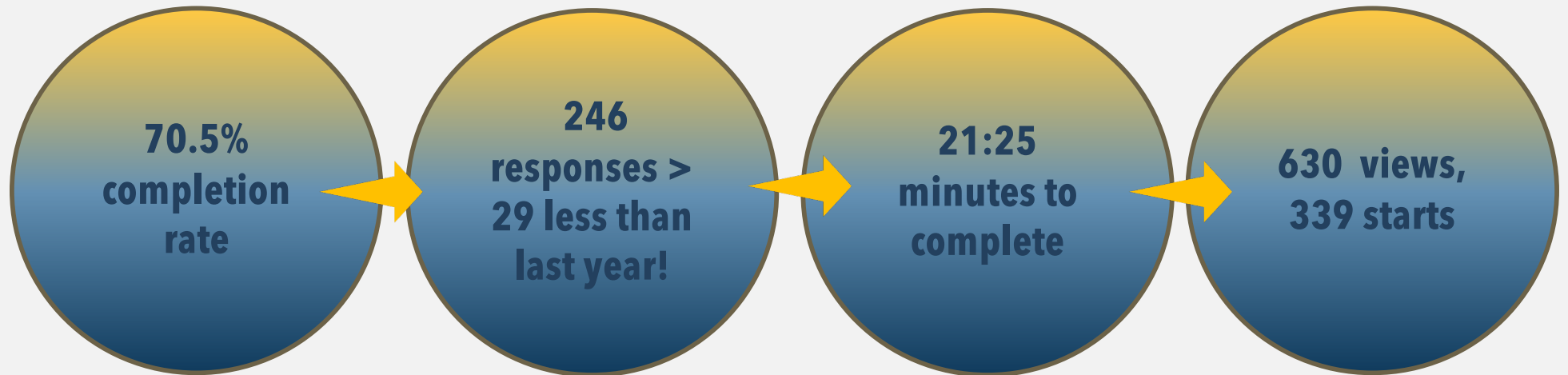
Goals

Understand the results of the Annual Survey

Note changes & improvements for next year



Survey Logistics

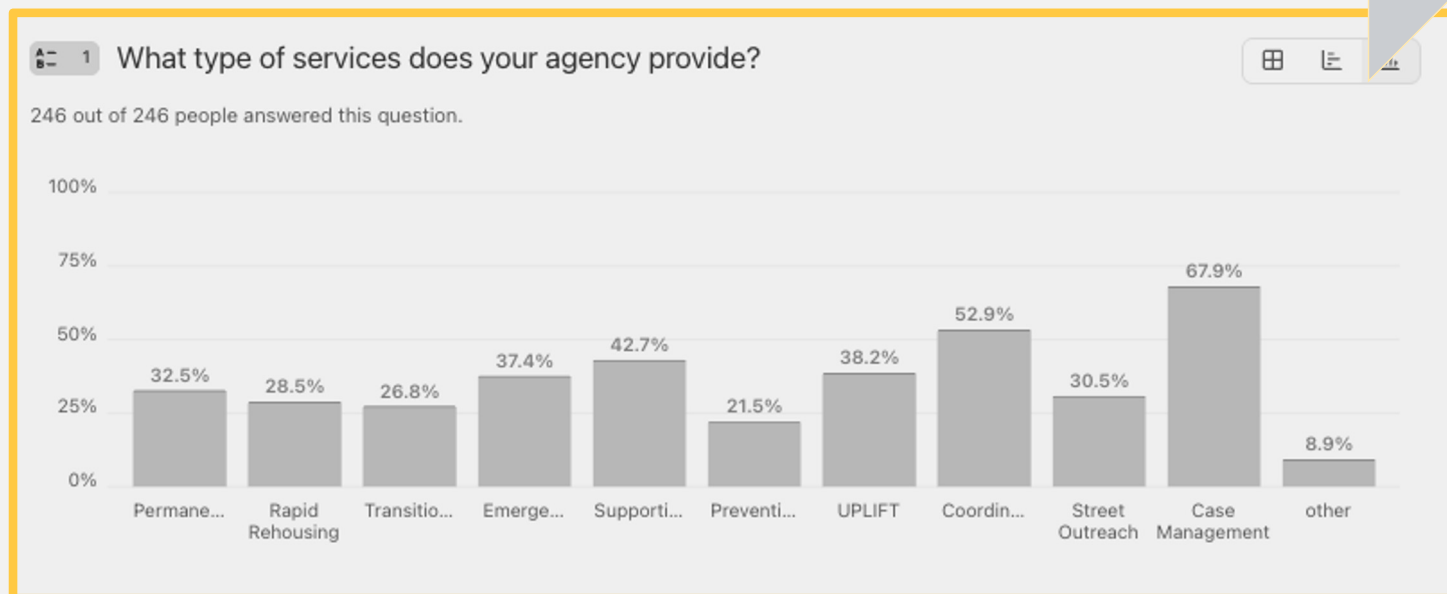


Type of Services Agencies Provide

More than half of respondents offer Case Management

The second highest offered was Coordinated Entry

8.9% responded as "Other" down .2% from last year

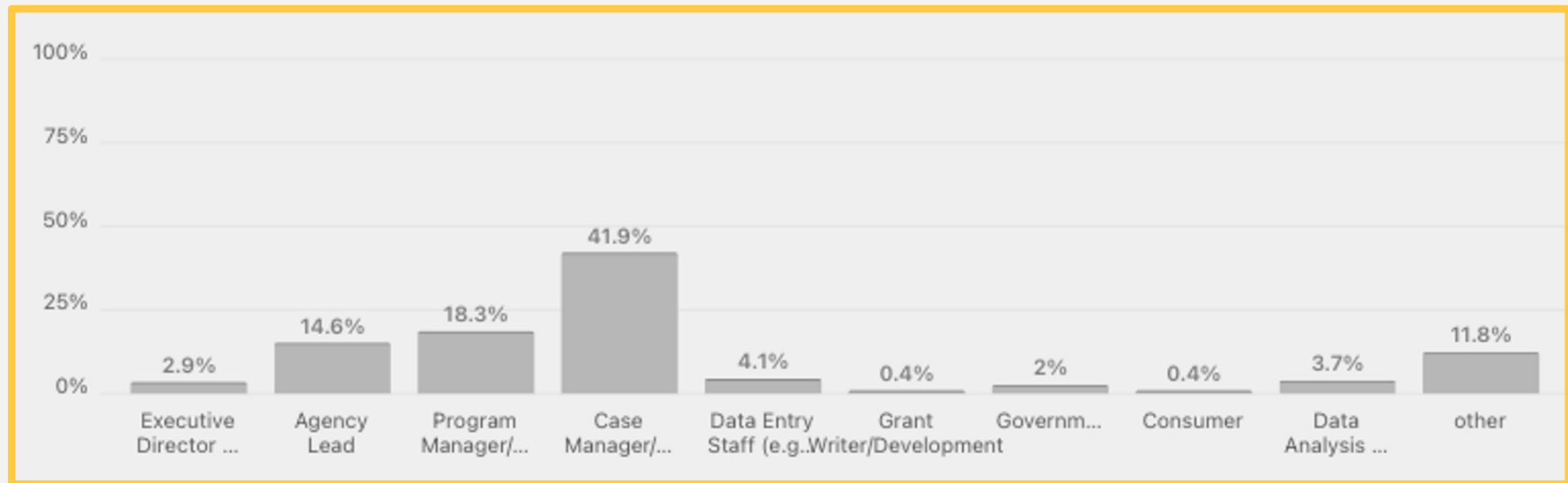


Primary Role

Case Manager/Client Services (VI-SPDATs, entering any Services or Enrollments)

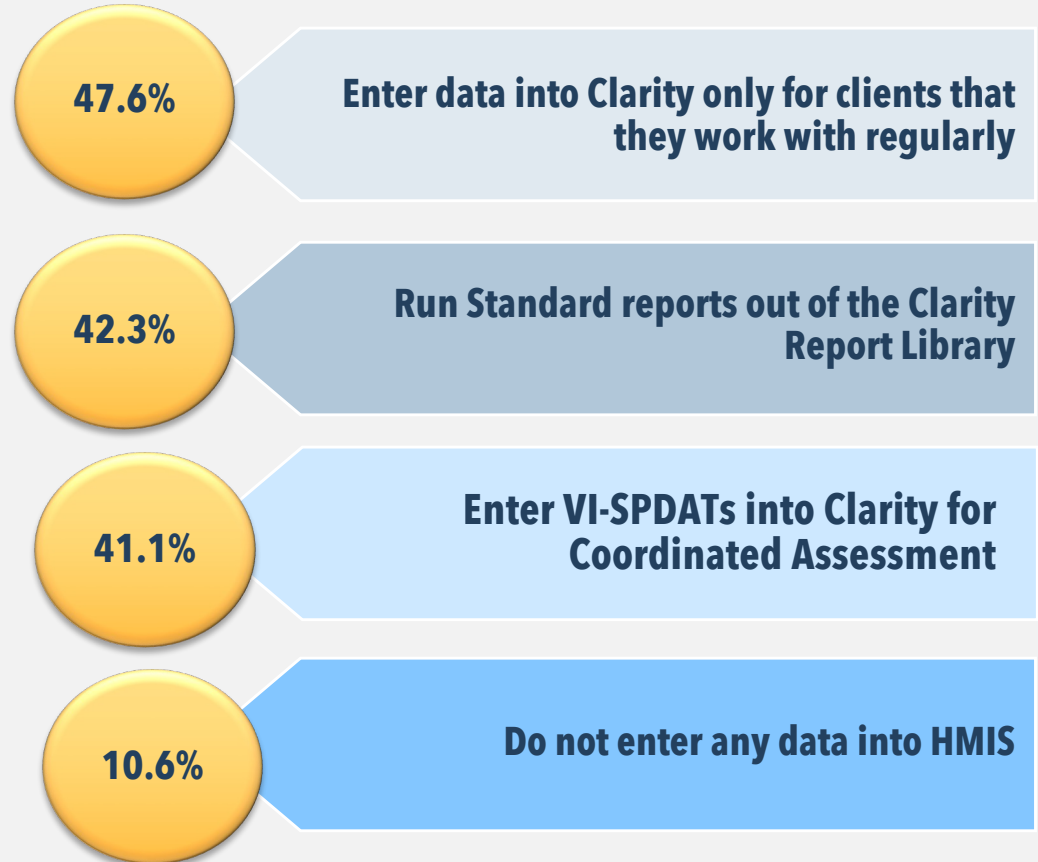
Program Manager/Director/Supervisor were the next highest

Agency Lead

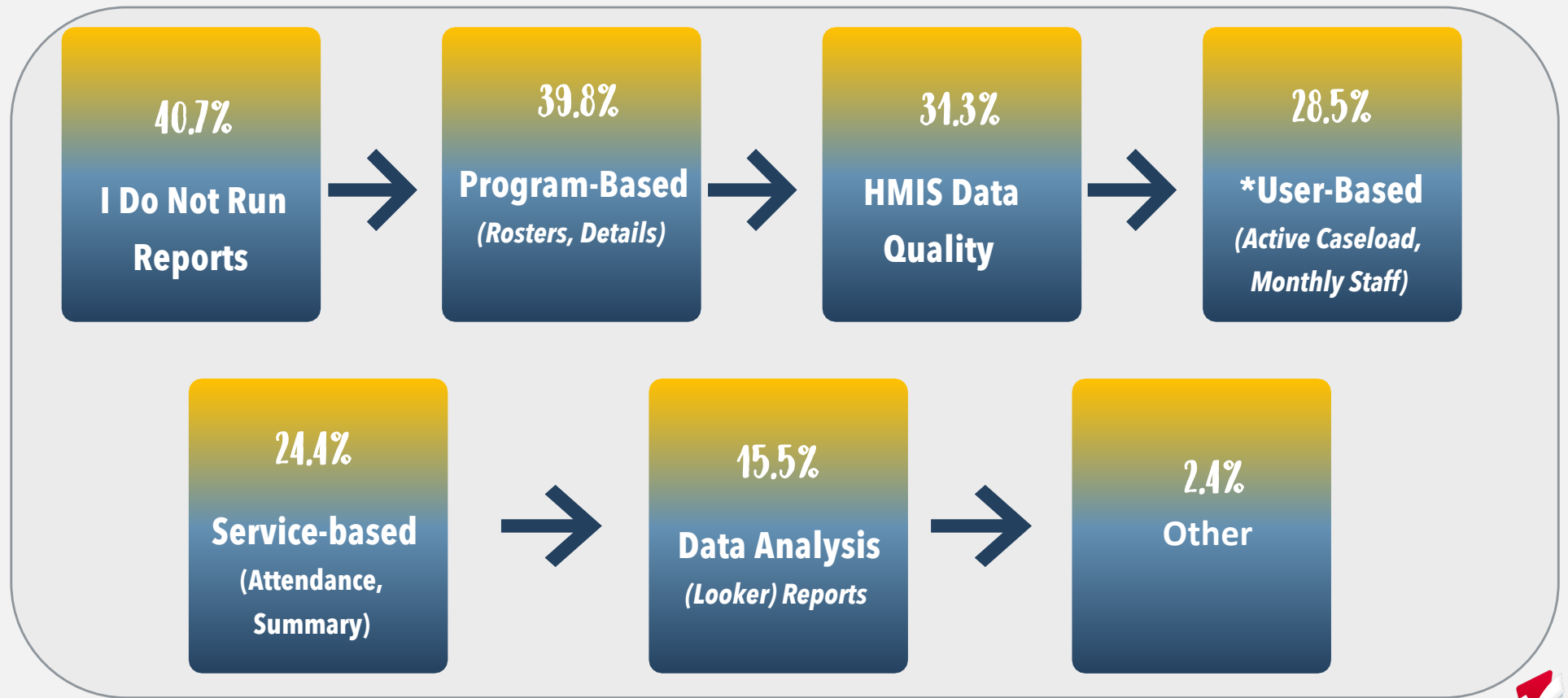


Using Clarity

Choices	Responses	Percentages
Enter data into Clarity for one or more programs at my agency, regardless of how closely I work with the clients served	77	31.3%
Enter data into Clarity only for clients that I work with regularly	117	47.6%
Enter VI-SPDATs into Clarity for Coordinated Assessment	101	41.1%
Run Standard reports out of the Clarity Report Library	104	42.3%
Review standard reports from the Clarity Report Library	74	30.1%
Run specialized, custom reports for program planning or evaluation (i.e. Looker)	54	22%
Don't enter any data into HMIS	26	10.6%



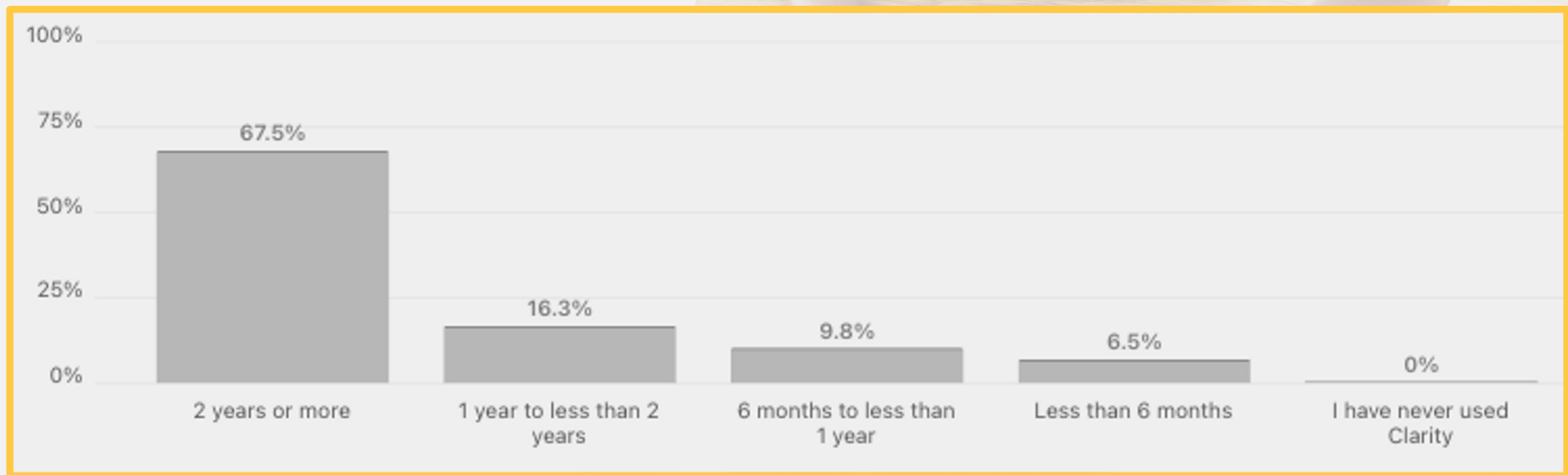
Frequently Run Reports



HUD Reports was the main answer in "Other".



Clarity End User Experience



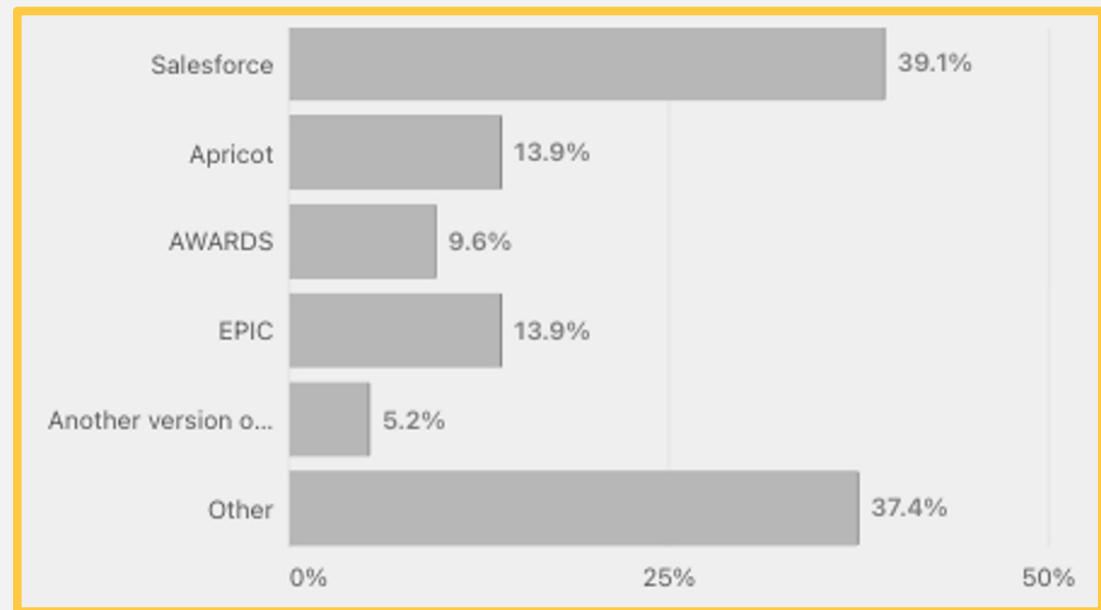
"Does your agency use *another* Data Management System?"

56.7%
2024

51.6% responded **YES**,
they do use another data
management system

43.3%
2023

48.4% responded **NO**,
they do not use another data
management system



Recommendation to add a follow up for "Other"



Reasons for Additional Data Management System

2024

Choices	Responses	Percentages
Required by Funding Agency	53	34.9%
Need to capture more data than available in Clarity	80	52.6%
Used for billing	30	19.7%
Need specific reports	53	34.9%
Provides functionality not available in Clarity (Please select Other and describe in Comment)	42	27.6%
Other	50	32.9%

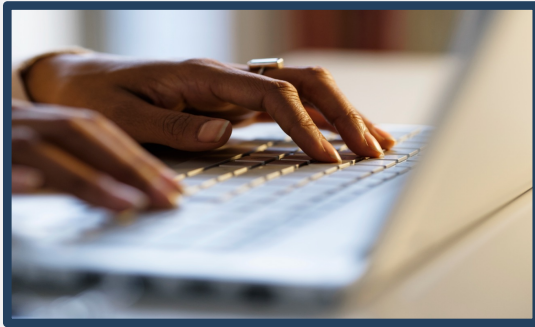
2025

Choices	Responses	Percentages
Required by Funding Agency	37	30.8%
Need to capture more data than available in Clarity	64	53.3%
Used for billing	30	25%
Need specific reports	44	36.7%
Provides functionality not available in Clarity (Please select Other and describe in Comment)	35	29.2%
Other	33	27.5%



Data Quality (Scores Based 1-5)

[1 being the lowest & 5 highest]



Respondents feel confident about the data being entered by their agency (4.1) but less confident of other agencies (3.5)



Data quality is a high priority for end users (4.5)



Respondents feel it's easy to enter client-level data into Clarity (3.9)



Overall Satisfaction – End Users are Satisfied with...

**Clarity
Human
Services**

**Bitfocus
Help Desk**

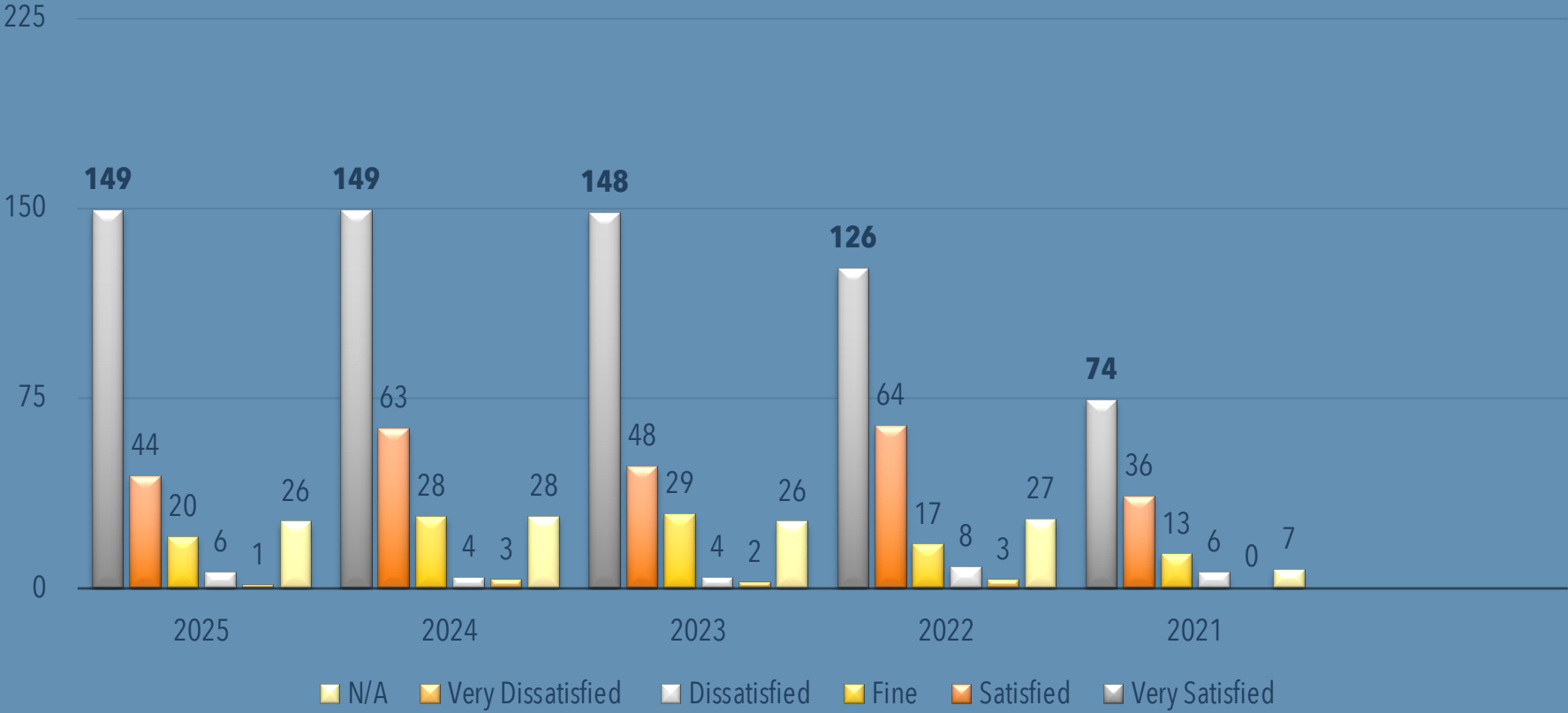
**System
Admin. Team**

**Training
Provided by
Bitfocus**

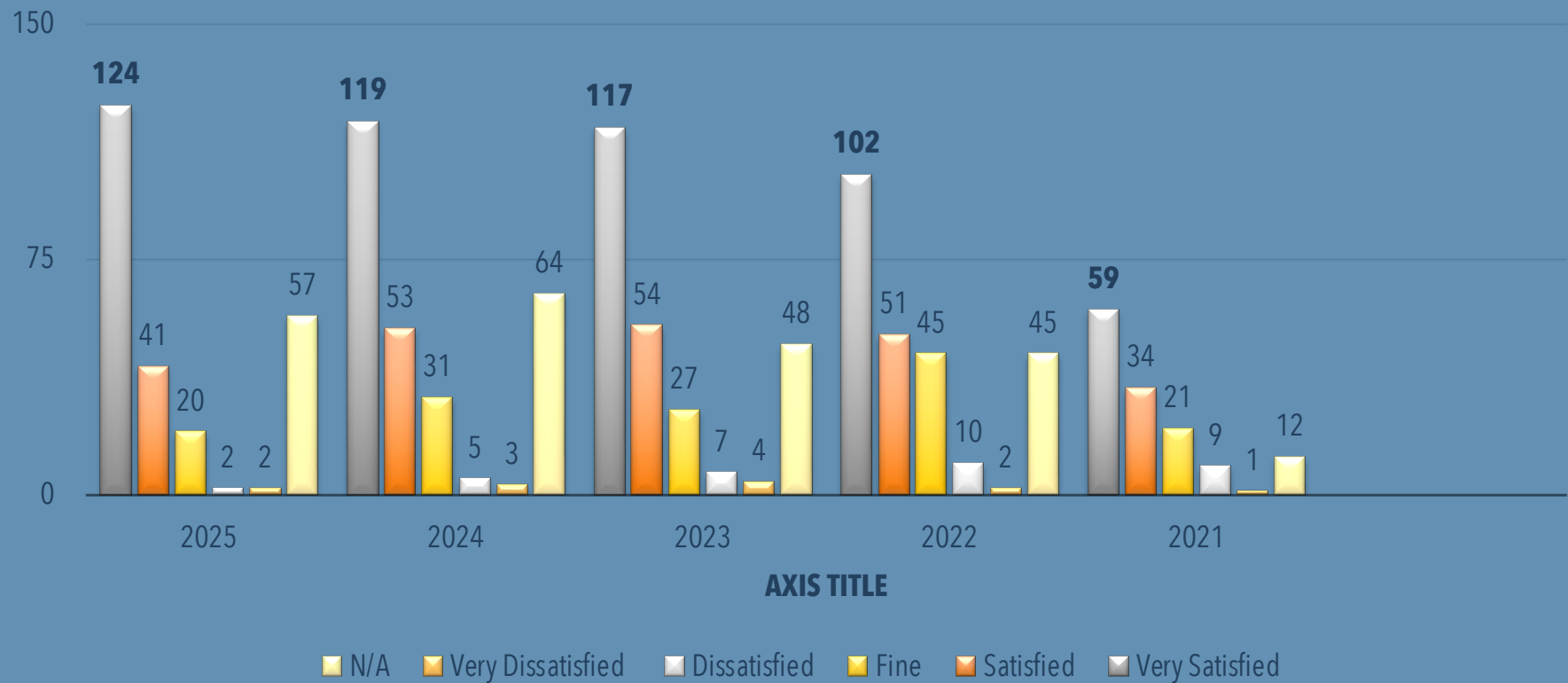
**Data
Engagement
Workshops**



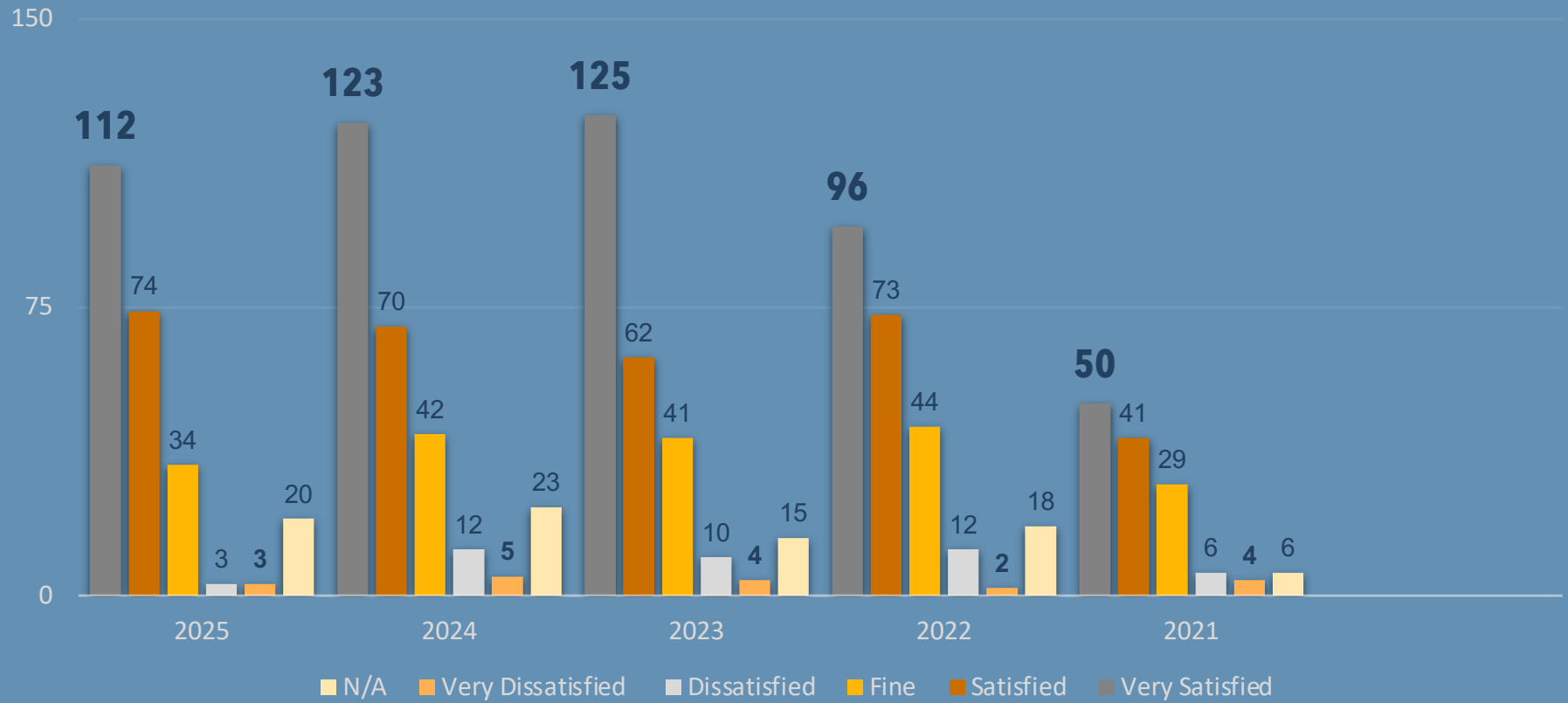
Help Desk Satisfaction Over Time



Bitfocus System Administration Team Satisfaction Over Time



Clarity Training Satisfaction Over Time



How do you think you and your team team members learn best?

Choices	Responses	Percentages
Recorded trainings that we can go back to when we need them	144	58.5%
Live virtual trainings (eg. Zoom)	151	61.4%
Live in-person trainings	131	53.3%
Handouts or Cheat Sheets	134	54.5%
other	5	2%



Who do you go to when you need to learn something new?

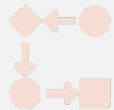
Choices	Responses	Percentages
The Agency Lead	85	34.6%
Colleagues at my agency	113	45.9%
The Bitfocus Community Administration team	90	36.6%
The Bitfocus HelpDesk team	127	51.6%
HelpCenter articles or internet search	56	22.8%
other	6	2.4%



Recommendations



Increase number & types of training sessions in this community (Running reports, in-person/online, etc.)



Workflow Reconfiguration (entering data, fewer clicks, multiple at one time, etc.)



Create customized reports & allow for upload & auto-filling of enrollment paperwork for families instead of typing in each enrollment at a time



Additional options for data import and export to reduce double data entry



System feels too rigid for preventative programs or mental health services. Proposing a "Clinical Workgroup" to simplify these workflows.



Survey Responses – What Stayed the Same

END USER EXPERIENCE

Access Roles:

Case Manager/Program
Manager/Data Entry

2 or more years experience

Value & prioritize DQ as being
important (4.1 out of 5) & trust
data being entered by other (3.5
out of 5).

End Users remain satisfied with
Help Desk and Admin. Team

USING CLARITY

56% Enter data into Clarity only
for clients that "I work with
regularly"

Recommendation from last
year includes more & different
types of trainings

Users report a need for simpler
data entry & UPLIFT process

OTHER DATABASE

Over 50% of users continue to
use other data management
systems.

Salesforce remains the most
common comparable system,
primarily used to capture data
points not available in Clarity.



Survey Responses – What Changed?

Training Preferences:

While “recorded trainings” were the top preference in 2024 (62.2%), “live virtual trainings” became the most preferred method in 2025 (61.4%).

Shift in Service Types:

In 2024, Coordinated Entry was the most common service provided (47.3%). By 2025, Case Management moved to the top spot (67.9%), followed by Coordinated Entry (52.9%)

Survey Engagement:

The 2024 survey had 275 responses, while the 2025 survey saw a decrease of 29 responses, totaling 246 but with fewer views and starts. The time taken to complete the survey increased significantly from 11:33 minutes in 2024 to 21:25 minutes in 2025

Also requested more and different types of training, and ability to fix errors without contacting the helpdesk



QUESTIONS?



MAY PERFORMANCE MANAGEMENT WORK GROUP



Join Us May 28th, 1-2:30 PM In-Person

May PMWG

- We are concluding the Performance Management Work Group with an in-person session. We would love for you and your end users to join us for this final meeting!

Location

- 150 W. Tasman Dr, San Jose, CA 95134.
- Register in advance for the meeting using [this link](#).

Topic

- Review: Finalize all benchmark decisions and incorporate community feedback from the series.
- Optimization: Identify necessary adjustments or process improvements for the 2027 series.

Questions

- email us scc-admin@bitfocus.com



DISABLING CONDITON WARNING



Disabling Condition Warning

DISABLING CONDITIONS AND BARRIERS

Disabling Condition	Yes	▼
Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	No	▼
HIV - AIDS	No	▼
Mental Health Disorder	No	▼
Substance Use Disorder	No	▼




Disabling Condition is set to 'Yes,' but no long-term disability type has been selected, which may lead to data quality errors. Please update Disabling Condition or select at least one disability type as long term, if applicable.



Disabling Condition Warning

DISABLING CONDITIONS AND BARRIERS

Disabling Condition	Yes	▼			
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Developmental Disability	No	▼			
Chronic Health Condition	Yes	▼	Long Term	No	▼
HIV - AIDS	No	▼			
Mental Health Disorder	No	▼			
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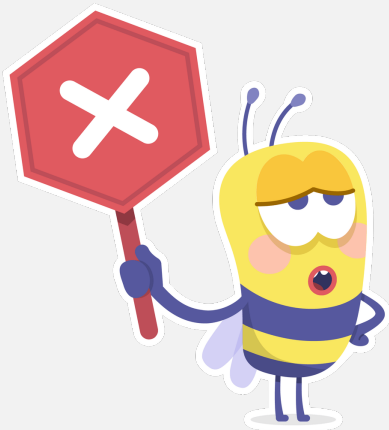
Disabling Condition Warning

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Developmental Disability	No	▼			
Chronic Health Condition	Yes	▼	Long Term	Yes	▼
HIV - AIDS	No	▼			
Mental Health Disorder	No	▼			
Substance Use Disorder	No	▼			



Disabling Condition Warning



HUD requires that a disability be "long-term" (or of indefinite duration) to meet the legal definition of a **"Disabling Condition"** in 3.08 Disabling Condition - HMIS Data Standards to determine eligibility for specialized, permanent housing programs designed for people with severe, chronic needs (e.g., Permanent Supportive Housing).



Disabling Condition Warning

Why HUD Requires "Long-Term"

- **Targeting Resources:** HUD programs, particularly for chronic homelessness, are designed for individuals whose disability substantially impedes their ability to live independently and who require intensive support.
- **Definition Criteria:** According to 3.08 Disabling Condition - HMIS Data Standards, the condition must meet all three:
 - Be long-continuing or of indefinite duration.
 - Substantially impede the individual's ability to live independently.
 - Be improved by more suitable housing.
- **Distinguishing from Temporary Needs:** Temporary illnesses (e.g., a broken leg, acute influenza) do not meet the stringent eligibility criteria for CoC and ESG Homeless Eligibility - Disability Definition or chronic homelessness, which focus on permanent impairments.



Disabling Condition Warning

What if a Client's Disability is NOT Long-Term?

- **Response:** If the condition is temporary, the client does not meet the 3.08 "Disabling Condition" standard. The answer to "Does the client have a Disabling Condition?" should be **No**.
- **Still Record Data:** The client can still have a, for example, "Physical Disability" recorded in HMIS. However, you must answer **No** to the sub-question: "*Expected to be of long-continued and indefinite duration...*".
- **Impact on Eligibility:** A temporary disability generally will not qualify a client for PSH programs that require a "disabling condition" for admission.



Disabling Condition Warning

Why HMIS Provides a Warning

HMIS triggers a data quality warning—or a “data error”—when a client is marked as having a specific disability (like a physical, mental, or substance use disorder) but not marked as having a “Disabling Condition.”

- **The Conflict:** The system assumes that if a specific disability is listed, it likely meets the “long-term” criteria.
- **Identifying Inconsistencies:** The error is designed to prevent “No” being marked for “Disabling Condition” when a specific disability *type* is marked “Yes”.



SCC Quarterly Compliance Certification Checklist



SCC HMIS Compliance Checklist

Process

- Email reminder sent of upcoming deadline (including CE/ECM Programs)
- You will run report in DA Tab for list of End Users
- You will send list of certified End Users to Sys. Admin. Team per usual

Certification Deadline

Friday, April 30

- Include all NEW HMIS users at your agency on **the standard form found here**
- This means that your date range filter in the report on the DA tab will be **01/01/2026 - 03/31/2026**
- The report has been preset with this date range; so just select your agency name
- Detailed steps on running the report can be found here

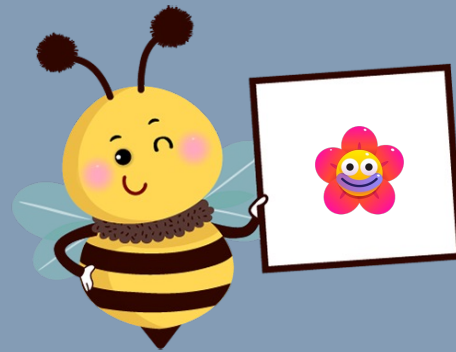
Non-HMIS End Users Assessors

Please provide the names and email addresses of Non-HMIS Users at your agency who provide VI-SPDATs to clients; we want to make sure to capture this information to ensure updates to VI-SPDATs are provided to them. **We have created a form for this here.**

Questions

email us scc-admin@bitfocus.com





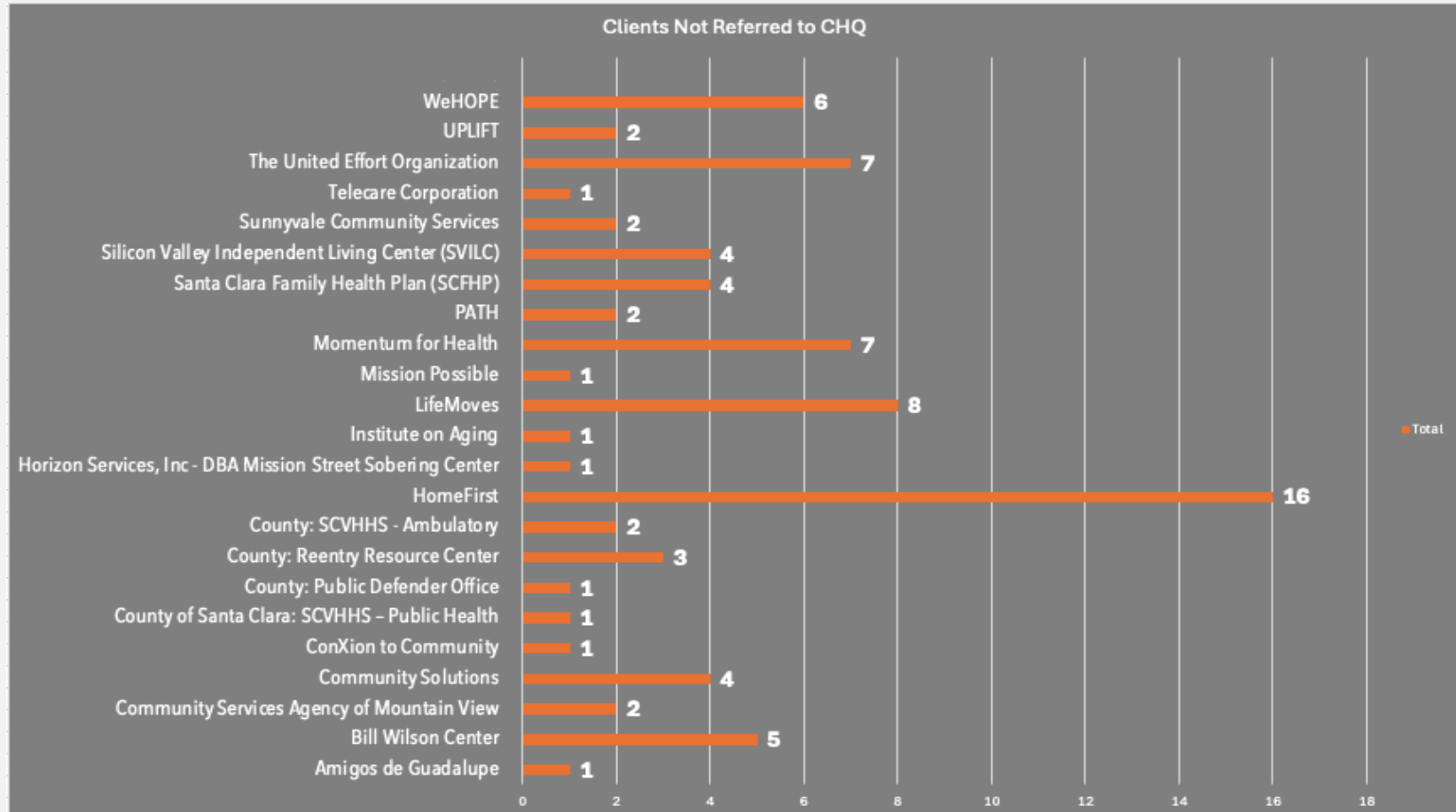
MEMOS



**RECENTLY ASSESSED
& NOT ON CHQ**



RECENTLY ASSESSED & NOT ON CHQ





Q & A



Next Month's
Thursday, June 4, 2025

