

June 2025 TA/Agency Lead Minutes



or call (650) 209-0653

MEETING OBJECTIVES

UPDATES

- CoC Updates
- UPIFT Updates
- HMIS Newsletter

IN THE KNOW

- HIC/PIT – News!
- SCC Annual Client Consent Training – What Happens Next?
- *Email Notifications*
- Report Spotlight – [GNRL-409] Annual Assessment Overview
- *VI-SPDAT Updates!*
- *Program Restrictions*
- *Data Sharing*

MEMOS

- MyConnectSV – Referral Notifications Live!
- Recently Assessed & Not on CHQ
- SCC Quarterly Compliance Checklist Q1
- Q & A Time
- Next Month's Meeting

UPDATES

CoC Updates

MyConnectSV

- Send And Respond To Messages - Check in with clients securely
- Send Document Requests for clients to upload files that will be attached to HMIS profile
- Request Location Updates - Request client location at any time. View client provided locations if client has enabled location permissions
- Schedule Client Appointments
- ROI Updates - Request that clients complete ROIs
- Peer Support is available for clients who need help using MyConnect MyConnectSV@theunitedeffort.org

Focus Groups

- Partners at HomeBase have sent invitations for Service Provider Focus Groups
- Next focus group: Tuesday, June 17th at 9:30am via zoom – invitations have been sent
- Service Providers Invited
 - Amigos de Guadalupe
 - Bill Wilson Center
 - Compassion Center
 - Family Supportive Housing
 - HomeFirst
 - PATH
 - Pathway Society
 - Razing the Bar

Thank You – For Further Information:

Alejandra Herrera Chavez, Program Manager
Office of Supportive Housing | County of Santa Clara
Alejandra.Herrera@osh.sccgov.org

Upcoming Events

June 2025				
MON	TUES	WED	THURS	FRI
			10am SCC County Office Hours	
			10am SCC County Office Hours	
10am SCC County Office Hours	10am SCC County Office Hours	9:30am Service Providers Network Meeting		10am SCC County Office Hours
10am SCC County Office Hours	10am SCC County Office Hours	10am SCC County Office Hours	10am SCC County Office Hours	10am SCC County Office Hours
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UPLIFT Updates

FY 2025 Q4 April – June

BEFORE THE QUARTER ENDS

- You MUST exit any client that did not receive an UPLIFT pass (sticker) from your agency last quarter. Otherwise, there will be issues when requesting a pass in the next

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quarter.

- Only clients who received a pass last quarter from your agency are considered “continuing clients” and can have a status assessment submitted. ALL other clients must be exited and have a new enrollment form submitted for them dated 6/13.

REMINDERS FOR REQUESTING PASSES

- New Client = **Enrollment form** (program start date should say 6/13)
- Continuing client = **Status assessment** (make sure they received a pass last quarter)
- MUST be dated **6/13/25**
- Quarter: Jul - Sep
- Request either a “Sticker” **OR** “Badge and Sticker”
- **ONLY** request a “Badge and Sticker” if
 - Enrolling a new client
 - A continuing client has lost their badge
 - **Clients should be reusing their UPLIFT badges each quarter**
- Please check client HMIS profile to see if another agency has already requested one before submission

COMMON ERRORS

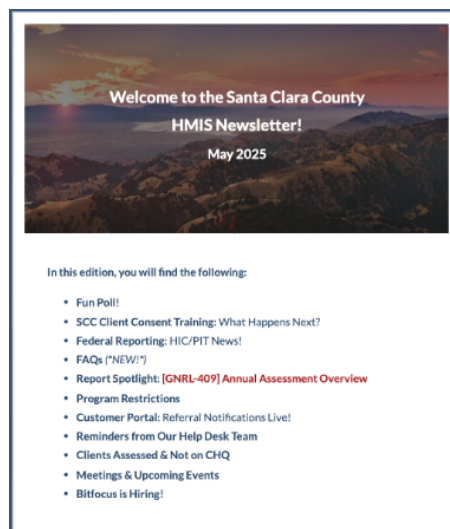
- No photo
- Wrong quarter
- Wrong enrollment/status assessment form
- Wrong date
- Unusable photo (face coverings, poor photo quality)
- No client name

ROI (outdated, permission denied)

UPLIFT PROGRAM COORDINATORS ONLY

- Allocation surveys have been sent out; Due 6/11
- Final allocations sent 6/12
- Email UPLIFT@hhs.sccgov.org if the program coordinator at your agency changed

HMIS Newsletter



IN THE KNOW

HIC/PIT News!

- Deadline for submission: 6/13/2025 by 5PM
- **Thank you for all your Data Quality and follow-up!**

Annual Client Consent Training

- Training Completion Deadline May 12, 2025
- End Users Access Removed – *Made Inactive*
- Training Completion – End User should contact Help Desk to be reinstated
- Tips
- *Use same email as in HMIS*
- *Use same name as in HMIS*
- *Multi-tasking during training discouraged*

Email Notifications

SHARING INFORMATION

- Conveying important details about workflows, deadlines, or news.

REQUESTING INFORMATION

- Asking for clarification, guidance, or assistance from Bitfocus or other Agency Leads. Data Quality Outreach.

ARRANGING MEETINGS

- Scheduling meetings, conferences, or training.



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PROVIDING UPDATES

- Keeping End Users informed about progress, changes, or outcomes.

OFFERING PROFESSIONAL ADVICE

- Providing expert insights, recommendations, or solutions – Office Hours.

THE EMAIL ADDRESS IS INVALID

- Typos, or address has changed or failed validation

UNSUBSCRIBED

- End User accidentally unsubscribed from a specific email type or from all emails from our domain

SPAM/JUNK BOX

- Emails frequently "ignored" may result in SPAM or JUNK

SERVER ISSUES

- End User or Agency has blocked our notifications

Report Spotlight - [GNRL-409] Annual Assessment Overview

This program enrollment-based report provides a comprehensive view of the Annual Assessment Statuses.

It tracks client progress regarding their annual assessments, providing insights into the timely completion of assessments, overdue assessments, and data-related issues to assist with data quality, compliance, and monitoring.

Program Based Reports > [GNRL-409] Annual Assessment Overview

Project Type(s)
Choose...
All
Emergency Shelter – Entry Exit
Emergency Shelter – Nightly-High
Transitional Housing

Program Status
Active Programs

Program(s)
Choose...
All
Bella Vista Abode
BHSD Casa De Novo Interim (H)
Casa De Novo Interim (H)

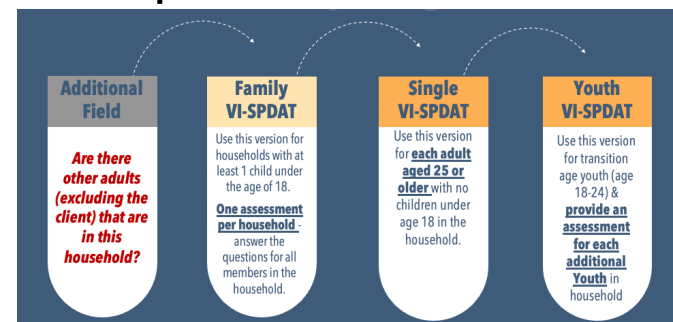
Annual Assessment Status(es)
Choose...
All
Completed
Completed Out of Range
Past Due
Due
Assessment Window Opening in 30 Days
Not Due
Enrolled Less than 1 Year
Data Issue
Exited Before Home's 1st Anniversary

Report Start Date
05/01/2025

Report Output Format
☒ Web Page ☐ PDF ☐ Excel

Annual Assessment Overview										
Annual Assessment Status		Completed	Completed Out of Range	Past Due	Due	Assessment Window Opening in 30 Days	Not Due	Enrolled Less than 1 Year	Data Issue	Exited Before Home's 1st Anniversary
# of Assessments		0	0	1	5	3	5	0	0	0
Client Detail										
Unique ID	Client Name	Relationship to HH	Start Date	Exit Date	LOS	Expected Annual Assessment Count	Completed Annual Assessment Count	Last Annual Assessment Date	Last Annual Assessment Status	Next Annual Assessment Due
1	9794	Self	12/10/2024	-	162	0	0	-	-	12/10/2025
2	F330	Self	12/07/2024	-	226	0	0	-	-	12/07/2025
3	9883	Self	07/01/2024	-	304	0	0	-	-	07/01/2025
4	C86P	Self	07/01/2024	-	304	0	0	-	-	07/01/2025
5	9717	Self	07/01/2024	-	304	0	0	-	-	07/01/2025
6	242A	Self	06/01/2024	-	354	0	0	-	-	06/01/2025
7	9898	Self	01/04/2025	-	117	0	0	-	-	01/04/2026
8	VE8B	Self	06/01/2024	-	365	1	0	-	Past Due	06/01/2026
9	9792	Self	06/01/2024	-	364	0	0	-	-	06/01/2025
10	3659	Self	06/01/2024	-	354	0	0	-	-	06/01/2025
11	10C4	Self	06/01/2024	-	354	0	0	-	-	06/01/2025
12	9782	Self	06/01/2024	-	354	0	0	-	-	06/01/2025
13	C460	Self	05/16/2025	-	5	0	0	-	-	05/16/2026

VI-SPDAT Updates



The Changes

1. If there are other adults who will be living in the household with the client, please toggle "Are there other adults (excluding the client) in this household?"

2. Are there other adults (excluding the client) that are in this household? ☒

3. You have selected the toggle on for "Are there other adults (excluding the client) that are in this household?" Please enter the number of adults.

Total number of adults (excluding client) in the household

Selected the additional number of adults that will be housed with the client

✓ Select

- 1 Adult
- 2 Adults
- 3 Adults
- 4 Adults
- 5 Adults
- 6 Adults
- 7 Adults
- 8 Adults
- 9 Adults
- 10 Adults

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Total number of adults (excluding client) in the household	4 Adults		
Adult: 1 Full Name	Person One	Adult: 1 DoB	05/15/1989
Adult: 2 Full Name	Person Two	Adult: 2 DoB	01/02/2000
Adult: 3 Full Name	Person Three	Adult: 3 DoB	08/26/1978
Adult: 4 Full Name	Person Four	Adult: 4 DoB	11/16/1942

Program Restrictions

[Program Restrictions](#) - (Please see demo on slide deck)

Provides a way for end users to document when a client has been denied future services at one or more programs

CLIENT PROFILE

Social Security Number: ***-**-XXXX
 Quality of SSN: Client doesn't know
 Last Name: Skywalker Test
 First Name: Luke
 Quality of Name: Full name reported
 Quality of DOB: Full DOB Reported
 Date of Birth: 08/28/1974 Adult Age: 50
 Middle Name: Suffix: None
 Alias: Test Client
 Gender: Transgender, Non-Binary
 Race and Ethnicity: Middle Eastern or North African
 Additional Race and Ethnicity Detail: [Empty]

Household Members

Grooming Adult Child (Housing) Father

Active Programs

Outreach

Recent Services

Housing Problem Solving Financial Ass...
 Case Management: Case Management
 Case Management: Case Management
 Homelessness Prevention Financial Ser...
 Supplier: Supplies Delivered

Data Sharing

Protecting client data in HMIS is crucial for maintaining client trust, ensuring legal compliance, and safeguarding against potential harm.

HMIS contains sensitive personal, medical, and financial information about individuals experiencing homelessness, making it a high-risk target for data breaches and privacy violations.

Knowledge Test Time

Q) A client walks into your agency and is requesting assistance. You inform them of the next steps and requirements of your program. You discuss with the client the ROI and ask they initial the items after they have read them. The client returns the ROI to you, and you notice the following item has not been signed off?

Box 1 Identifying information

How do you proceed with this client?

Answer - Client should be made anonymous

Q) You have a client that is concerned with their legal status in the United States. She is wondering how her sharing information with you may result in her being deported.

What is your response to this client?

Answer - Agencies that use HMIS are not the "owners" of the data entered so therefore cannot share any information

IF Immigration and Customs Enforcement (ICE) or the Police wanted access to the information entered, they would need to get a subpoena, or a court ordered document

Q) What are actions/steps that should be taken to help minimize and/or to prevent a data breach?

Answer -

- Safeguarding client privacy by ensuring Partner Agency and Partner Agency End User compliance with all applicable confidentiality and security policies
- Investigating potential and actual breaches of either SCC HMIS system security or client confidentiality and security policies, and immediately notifying the County and the System Administrator
- Managing new, retired, and compromised local system account credentials
- Developing and implementing procedures that will prevent unauthorized users from connecting to any private Partner Agency networks

MyConnectSV - Referral Notifications Live!

Referral Notifications - With this update, client users of MyConnectSV will receive an email or SMS notification at set intervals that they have a pending program referral and there will be a banner visible in their account's Dashboard until the referral is accepted, denied, expired or deleted.



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Client Notifications - If the *Referral Notifications* field is enabled and the *Referral SMS/Email Notifications Frequency* is set to *Daily*, *Weekly*, or *Monthly*, a client with access to the [Customer Portal](#) will receive an email or SMS notification at the frequency selected for a pending program referral.

SCC Quarterly Compliance Certification Checklist Process

- Was due 4/30/2025
- Notifications went out; please submit checklist to have End Users Reinstated

Non-HMIS End Users Assessors

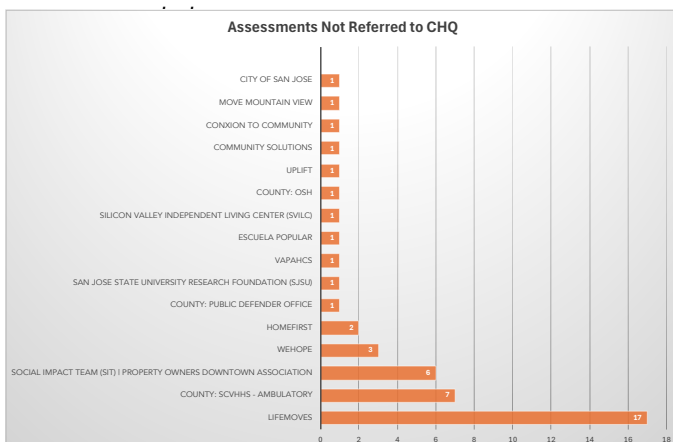
- Please provide the names and email addresses of Non-HMIS Users at your agency who provide VI-SPDATs to clients; we want to make sure to capture this information to ensure updates to VI-SPDATs are provided to them. We have created a form for this here.

Questions email us scc-admin@bitfocus.com

MEMOS

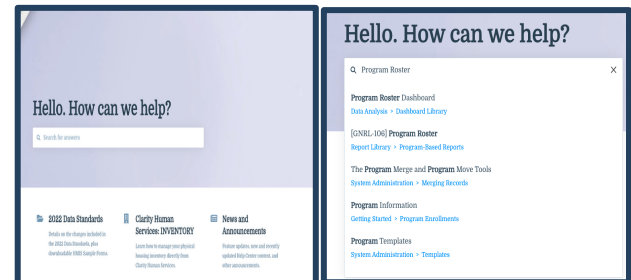
Recently Assessed & Not On the CHQ

Report for this data was run on Thursday, June 5th! Please

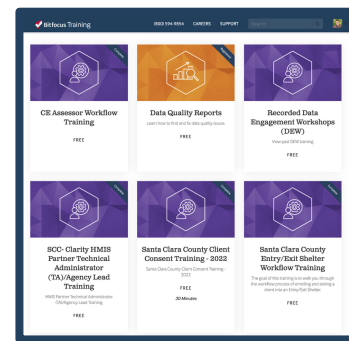


Resources

Clarity Human Services Help Center



Link to page embedded in image!



Link to page embedded in image!

- Multiple Training Opportunities and Refreshers
- Select the training you want to watch
- Don't have enough time to watch it all - pick up next time where you left off

Office Hours

Where Are Office Hours Held? Office Hours are conducted from the comfort of your own office! Each Office Hours session is hosted online by your Santa Clara County Clarity System Administration team. You can connect using your computer (recommended so that you can see demos and post questions).

Looker Office Hours

When: Every other Monday of the month Time: 2:00pm-3:00pm

[Zoom \(click here to access\)](#)

Clarity (HMIS) Office Hours



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When: Every other Thursday from 10:00am-11:30am

[Zoom \(click here to access\)](#)

Using the Help Desk

When requesting the following please be sure and contact the Help Desk:

1. End User Access
2. Update a user's access after completion of the VI-SPDAT required training
3. Verifying an end user has completed required training
4. Access to the SCC HMIS Training Instance/Sandbox
5. General Assistance with reporting

How To Contact the Help Desk

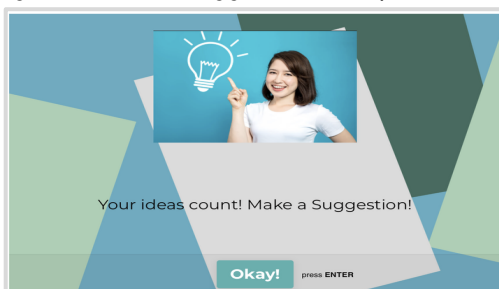
sccsupport@bitfocus.com

Or

(408) 596.5866 Ext. 2

SCC Virtual Suggestion Box

We value your opinion and insight. Please share with us your suggestions by using our new SCC Virtual Suggestion Box. You can access it by using the link above or directly from the [HMIS Support](#) page under the CONTACT tab and scrolling to the Virtual Suggestion Box option.



Have ideas about an enhancement and/or addition to HMIS?

*Have any general questions you'd like to ask?
Let us know! Drop it in the box!*

Next Agency Admin Meeting - **CANCELLED**

Meeting Location: [Zoom Link](#)

When: ~~Thursday, July 3rd, 2025~~

Time: 2:00pm – 3:30pm

Dates and locations for 2025 meetings are listed on the OSH website:

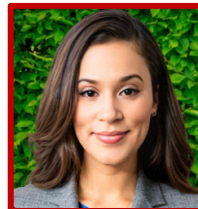
[CoC Events Calendar - Supportive Housing - County of Santa Clara](#)

Bitfocus Contact Information

Support Team: sccsupport@bitfocus.com

Bitfocus System Administration Team: scc-admin@bitfocus.com

Your Sys. Admin. Team:



Bryanna Corsbie

bryannac@bitfocus.com

Senior Project Admin, Santa Clara County
San Jose, CA
800.594.9854



Lesly Soto Bright

leslys@bitfocus.com

Senior Project Admin, SCC
South Bay, CA
800.594.9854 x256

List of Participants

If you attended the meeting but are not listed, please let us know.

Agency Name	Representative
Abode Services	Aida Tesfai
Abode Services	Luis Gonzalez
Amigos de Guadalupe	Aurora Olivares
Bible Way / Destiny	Aretha Cromwell
Bill Wilson Center	Laura Foster
California Youth Outreach	Anthony Ortiz Jr.

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Carry the Vision (CTV)	Renee Ridgway
Catholic Charities	Michael Strom
City of Campbell	Christopher Miranda
City of Morgan Hill	Brian Malicdem
City of San Jose	Marcell Leath
City of San Jose	My Nguyen
CityTeam Ministries	Christopher Chamberlain
Community Hotline	Harjeet Reehal
Community Solutions	Lindsay Mullins
ConXion to Community	Caroline Mireles-Sailor
County of Santa Clara: SCVHHS – Public Health	Alan Garate
County of Santa Clara: SCVHHS – Public Health	Chris Cheung
County: OSH	Fang Zhu
County: OSH	Leila Qureishi
County: OSH	Michelle Covert
County: OSH	Taylor David
County: SCVHHS - Ambulatory	Rebecca Siqueiros
County: SCVHHS - Ambulatory	Sia Bandabaila
County: SCVHHS - BHSD	Kalie Brewster
County: SSA - DEBS General Assistance	Lily Vasquez
County: SSA - DEBS General Assistance	Stacy Diaz
Destination: Home	Maureen Damrel
Downtown Streets Team	Justin Damrel
Downtown Streets Team	Maureen Damrel
Elevate Community Center	Keegan Pincombe
Emergency Rental Assistance (ERA)	Paulina Soto
Family and Children Services	My Nguyen
Family Supportive Housing	Alex Le
Gardner Health Services	Jovani Quinones
Goodwill of Silicon Valley	Micheal Baca
HomeFirst	Alisha Parret

Housing Choices Coalition	Nooria Alam
Institute on Aging	Christina Strine
International Children Assistance Network (ICAN)	My Linh Ha-Do
JobTrain	Syed Ali
LifeMoves	Carmen Kapanga
Midtown Family Services	Adwoa Armah
Midtown Family Services	Stuart Richardson
Move Mountain View	Taly Leibovici
Nation's Finest	Kim Decker
New Directions - Peninsula Healthcare Connection	Meyerlyn Sanchez
Pacific Clinics	Dominique Dumas
Pathway Society	Rita Anzualda
Roots Community Health Center	Emil Stephens
Roots Community Health Center	Shamese Smalling
Sacred Heart Community Service	Paulina Soto (deleted)
Santa Clara County Office of Education (SCCOE)	Emiko Taylor
Santa Clara County Office of Education (SCCOE)	Philip Truong
School Health Clinics of Santa Clara County	Jazmin Dominguez
School Health Clinics of Santa Clara County	Nancy Cervantes
School Health Clinics of Santa Clara County	Rose Anne Pierre
Social Impact Team (SIT) Property Owners Downtown Association	Chris Kendrix
Social Impact Team (SIT) Property Owners Downtown Association	Debra Rossi
St. Andrew's Residential Programs for Youth (STAR)	Vicky Taylor
St. Joseph's Family Center	Jose Macias
Starlight Community Services	Kutlo Rasetshwane

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Sunnyvale Community Services	Catherine Farry
Superior Court of CA, County of Santa Clara	Roxanna Frias
The United Effort Organization	Carolyn Stratton
Unity Care Group	Deepa Bhat
VAPAHCS	Maria Magallanes