

August 2025 TA/Agency Lead Minutes



MEETING OBJECTIVES

UPDATES

- CoC Updates
- UPIFT Updates
- HMIS Newsletter

IN THE KNOW

- Quarterly Compliance Checklist Q2 DUE
- TA/Agency Lead Grievance Form
- VI-SPDAT Changes – Check-in
- Funding Sources – Why They're Important
- Report Spotlight: [STFF-103] Staff Active Caseload

MEMOS

- Upcoming DEW!
- Recently Assessed & Not on CHQ
- Q & A Time
- Next Month's Meeting

UPDATES

CoC Updates – Potential 2025 CoC NOFO

While HUD had announced moving to a two-year funding competition cycle, a recent HUD emailed referenced a 2025 funding competition (instead of waiting until 2026)

As you know, the NOFO process is a huge undertaking in our community, and we start our local review process much earlier in the year to be better prepared

We don't have further details, but our community is trying to prepare for this potential by working with the NOFO committee and CoC Board to

- *shorten the application process*
- *consider what type of new funding/projects we will apply for (if bonus funding is available)*

- *protect current (renewal) projects*

You can join in advocating for HUD to keep its commitment for a two-year cycle

Please act and share with your agency and colleagues
[CEO Corner: Week of July 14 - National Alliance to End Homelessness](#)

Upcoming CoC Membership

- Look for an invite for September (Date TBD)
- We will be sharing updates and data on Final PIT Results
- *Community Plan to End Homelessness* planning efforts

Upcoming Events

August 2025				
MON	TUES	WED	THURS	FRI
				1
4 2pm SCC Leader Office Hours	5	6	7 2pm Technical Administrator (TA) Agency Lead Meeting	8
11	12 10am Data Think Tank	13 9:30am Service Providers Network Meeting	14 10am SCC Clarity Office Hours	15
18 2pm SCC Leader Office Hours	19	20	21 2pm NOFO Committee Meeting	22
25	26 9am SCC CoC VI-SPDAT Training	27 10am Homebase TA Office Hours 1pm DEW, NOFO & Managing Household Members	28 10am SCC Clarity Office Hours 2pm Rapid Rehousing & Employment Initiative Meeting 2310 N First Street, San Jose CA LED Training Room (Charter SCC Building)	29

UPLIFT Updates

- We are still processing the last batch of passes
- No more passes are available
- ***Please do not submit any new UPLIFT requests***
- *No more passes are available this quarter*
- If a client no longer needs their pass, we will contact you if your client is next on our waitlist
- Next Quarter, Q2 Starts in September
- Email UPLIFT@hhs.sccgov.org if the program coordinator at your agency changed

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HMIS Newsletter - New Look!

General Email Version



NEW! Webpage Version



IN THE KNOW

SCC Quarterly Compliance Checklist Q2 Due

- Deadline Thursday, July 31st, 2025 EOB
- Staff will be deactivated by Friday, August 8th, 2025

- Please DO NOT submit the Self Certification Form
- Please submit all checklists to
- [HERE!](#)
- [Quarterly Security Checklist Report: How to Guide](#)

TA/AGENCY LEAD GRIEVANCE FORM

HMIS Data Misuse & Breach Reporting Form

This form is used to report any data misuses or data breaches to the Santa Clara County CoC.

1. An incident involving unsecured Personally Identifiable Information (PII), if that PII was, or is reasonably believed to have been accessed or acquired by an unauthorized person.
2. A suspected security incident, intrusion, or unauthorized access, use, or disclosure of PII in violation of signed agreements.
3. Data misuse refers to the use of information in ways it wasn't intended for. This can include using personal data for purposes other than those originally intended, often violating user agreements, corporate policies, or data privacy laws.

PII is any information about an individual which can be used to distinguish, trace, or identify their identity, including personal information like name, address, date of birth or social security number.

Please complete as much of this form as possible. Depending on the specific nature of the incident, we may contact you for further details.

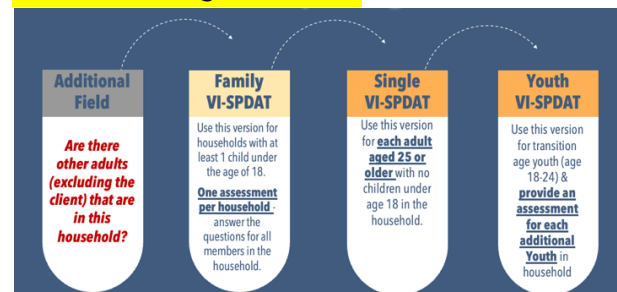
Full Name of Technical Administrator/Agency Lead Reporting Incident *

Name of the Agency where incident took place *

Forms & Documents for Technical Administrators (TA)/Agency Leads

- ✓ [SCC HMIS Partner Agency Privacy and Data Sharing Agreement](#) Rev. 2, 2025
- ✓ [Technical Administrator and Security Officer Agreement](#) version 10.21.2021
- ✓ [Electronic End User Agreement](#) version 01-29-2020
- ✓ [SCC HMIS Quarterly Compliance Certification Checklist](#) version 07.2021 ([DOC Version](#))
- ✓ [SCC HMIS Quarterly Compliance - Self Certification](#)
- ✓ [Santa Clara County Agency Admin. Meeting Attendance Policy](#) Revised 01.2020
- ✓ [Santa Clara County CoC Continuous Data Quality Improvement Process](#) September 2015
- ✓ [HMIS Data Misuse & Breach Reporting Form](#) 8.2025

VI-SPDAT Changes Check-In



FAMILY

Do NOT administer separate assessments for these "Other

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Adults." The assessment itself now captures this information, so discontinue any previous workarounds that involved separate assessments for them.

SINGLE & YOUTH

If "Other Adults" are added, please have them complete their own separate assessment. This allows us to account for potential future changes in household composition, such as couples separating or living situations changing

Funding Sources - Why They're Important

Entering funding sources into HMIS is crucial for several reasons, impacting both program effectiveness and funding continuity.

Reporting & Compliance

- Determine specific data & reporting requirements
- Recording funding sources is crucial for compliance & mandated reporting
- Meeting reporting requirements is essential for continued funding

Data Accuracy & Collection

- ✓ Different funding programs have varying definitions of homelessness and specific **data collection requirements**
- ✓ Selecting the correct **funding source guides the data collection process**, ensuring that accurate and relevant information is gathered for each program

Program Planning & Evaluation

- Funding source data allows for the analysis of which programs are most effective in addressing homelessness
- This information helps identify where resources are most impactful
- The data is used to pinpoint service gaps, inform funding decisions, and adjust program priorities
- By doing so, organizations can maximize the reach and effectiveness of each dollar spent

Performance Measurement

- Understanding the start and end dates of each funding source is essential for accurate performance measurement and reporting to HUD
- Dates help determine which projects or activities should be **included or excluded from grant-level or system-level performance reports**
- This ensures **compliance with reporting requirements** and provides an accurate representation of progress

REPORT SPOTLIGHT

[\[STFF-103\] Staff Active Caseload](#)

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59 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 04/13/2021

Assigned Staff: CHANGE ASSIGNED STAFF

Head of House: Make Program Private

Program Group: Staff Name

SAVE CHANGES CANCEL

Status Assessments: No Statuses

The report provides a detailed look at a user's current caseload.

Specifications

- **Specific Enrollment** Date of Birth (DoB), Length of Stay (LoS), assessments, services, and case notes
- Aggregate count of households, enrollments, and clients **for each assigned staff member**
- Staff Member is considered "assigned" to an enrollment based on the **"Assigned Staff" selection within the program enrollment**
- By default, the **"Assigned Staff" is the user who created the enrollment record**

associated with each enrollment.

Note: Please note that modifications to or the removal of the Staff Agency will result in staff no longer appearing in prompts and active assigned enrollments being excluded from reports.

Staff Caseload Overview Table

Staff Caseload Overview						
Staff Name	# of Households	# of Enrollments	# of Clients	Staff Name	# of Households	# of Enrollments
John Doe	0	0	0	John Doe	0	0
John Doe	14	16	14	John Doe	0	0
John Doe	0	0	0	John Doe	0	0
John Doe	1	1	1	John Doe	0	0

- The second part is The Staff Caseload Overview table displays an aggregate number of households, enrollments, and number of clients per the program assigned staff to review caseload size and mitigate potential reassignments as needed.

Assessments Drilldown Table

Staff Active Caseload Report

Assessments Drilldown

Last Assessment: - B6B6AAD3D

Assigned Staff: [Name], [Name]

Note: Program Assessments are currently toggled off within the Program Setup Screen.

Assessment Name	Assessment Date	Assessment Score
<div>Assessment</div>	07/17/2024	<div>1</div>

Total Assessments: 1

1 / 1

- The Assessments Drilldown returns a table with Assessment Name, Date, and Assessment Score (listing all applicable scores if associated with more than one Assessment Processor) when applicable. Assessment Name is a linking field and will redirect the user to the Assessment screen.

Services Drilldown Table

Staff Active Caseload Report			Last Assessment: 16DD88320	
Services Drilldown			Assigned Staff: [Name]	
Service Category	Service Name: Service Item Name	Delivery Type	Start Date	End Date
Employment	Employment: Employment	Long Term	05/14/2025	05/14/2025
				Total Service Days: 1

- The Services Drilldown returns a table with Service Category, a concatenated column with Service Name: Service Item Name, Delivery Type, Start Date, End Date, Total Service Days, and Expenses (when

Staff Active Caseload Report

Program(s): All

Staff Status(es): Active, Inactive, Locked

Staff: All

Assigned Staff:

Staff Name

Staff Name

Client Name	Unique ID	Birth Date	Relationship to HOH	Start Date	LoS	Assessments	Services	Case Notes
Project Type: Coordinated Entry								
John Doe	B6B6AAD3D	01/01/1975	Self	07/17/2024	336	1	0	0
John Doe	237D6940		Self	07/22/2024	331	1	0	0
John Doe	16DD88320	01/01/2000	Self	07/22/2024	331	3	1	1
Project Type: Other								
John Doe	16DD88320	01/01/2000	Self	12/11/2024	189	0	2	0
John Doe	892B34FC4	01/01/1980	Self	05/30/2025	19	0	0	0
Project Type: PH - Permanent Supportive Housing (disability required for entry)								
John Doe	D74711EAE	10/26/1987	Self	04/01/2022	1,174	3	0	0

- The first half of the report is broken down by assigned staff
- The Assigned Staff Table is organized first by staff member, then by program, and presents details about assigned clients, enrollment data (including Relationship to Head of Household, Project Start Date, and Length of Stay), as well as activity counts such as assessments, services, and case notes

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applicable). Service Name: Service Item Name is a linking field and will redirect the user to the Service (History: Edit) screen.

Case Notes Drilldown Table

Staff Active Caseload Report				
Case Notes Drilldown		Client Name: [Name]	Program Name: [Name]	Assigned Staff: [Staff Name]
Title	Category	Date	Time Tracking	Case Note
test	Case Notes	05/14/2025	test	
				Total Case Notes: 1

- The Case Notes Drilldown returns a table with Title, Category, Date, Time Tracking (when applicable), and Case Note. Title is a linking field and will redirect the user to the Client Notes screen.

MEMOS

UPCOMING DEW

ROI'S & MANAGING HOUSEHOLD MEMBERS

The August 27, 2025, workshop is for new and returning Clarity users who need to learn about or refresh their skills on two main topics

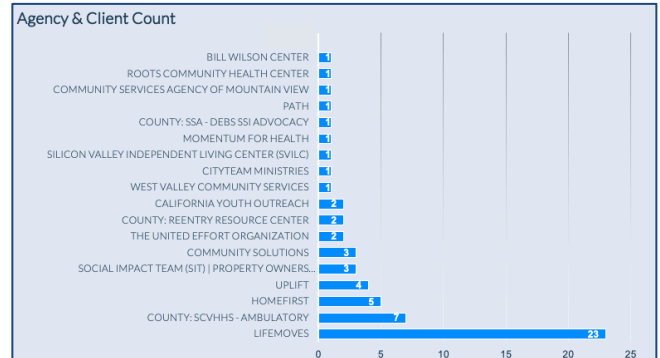
- 1. Updating a client's Release of Information (ROI)
- 2. Managing Household Members

The workshop will cover how to modify an existing ROI, and how to add or remove individuals from a household.

- Breakout groups will be available for more
- in-depth learning on various topics!
- No prior expertise required!
- ZOOM LINK REGISTRATION**

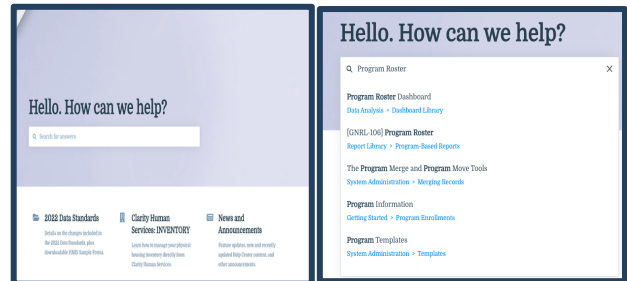
Recently Assessed & Not On the CHQ

Report for this data was run on Thursday, August 7th!
Please rerun as needed.

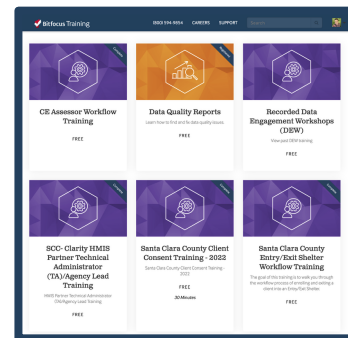


Resources

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

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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

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

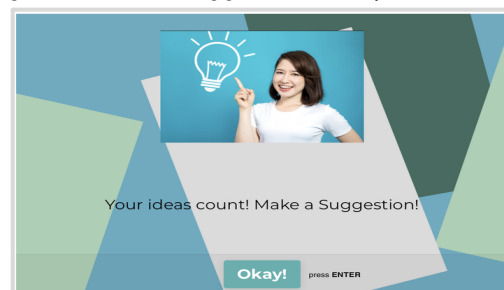
Or

(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

Meeting Location: [Zoom Link](#)

When: Thursday, September 4th, 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

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Lesly Soto Bright

leslys@bitfocus.com

Senior Project Admin, SCC

South Bay, CA

888.866.1533 x256

List of Participants

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

Agency Name	Agency Rep.
Abode Services	Will Hoffer
Amigos de Guadalupe	Aurora Olivares
Asian Americans for Community Involvement (AACI)	Leticia Barrera H
Bible Way / Destiny	Aretha Cromwell
California Youth Outreach	Anthony Ortiz Jr.
California Youth Outreach	Julian Delgadillo
Carry the Vision (CTV)	Renee Ridgway
City of Morgan Hill	Brian Malicdem
City of San Jose	My Nguyen
Community Solutions	Lindsay Mullins
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: SSA - DEBS General Assistance	Angelica Garay
County: SSA - DEBS General Assistance	Stacy Diaz
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	Brodie Storey
JobTrain	Syed Ali
LifeMoves	Carmen Kapanga
Nation's Finest	Ilaisaane Fifita
Nation's Finest	Kim Decker
North East Medical Services (NEMS)	Candido Anicete
Pacific Clinics	Dominique Dumas
PATH	Aiko Yep
Pathway Society	Rita Anzualda
Razing the Bar	Molly Orsburn
Roots Community Health Center	Emil Stephens
Roots Community Health Center	Shamese Smalling
Sacred Heart Community Service	Paulina Soto (deleted)
Salvation Army	Owen Persons
Santa Clara County Office of Education (SCCOE)	Emiko Taylor
School Health Clinics of Santa Clara County	Rose Anne Pierre
School Health Clinics of Santa Clara County	Sharbani Mazumder
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

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Stanford Health Care - Department of Social Work and Case Management	Priscilla Q3Checklist Lopez
Sunnyvale Community Services	Catherine Farry
Telecare Corporation	Christian Castellon
The United Effort Organization	Carolyn Stratton
Unity Care Group	Deepa Bhat
VAPAHCS	Maria Magallanes
WeHOPE	Anita Blount