



# HMIS Agency Administrators Meeting

Sept 6, 2018



# Agenda

1. CoC / Coordinated Assessment / UPLIFT / Bitfocus Updates
2. HMIS Newsletter
3. Report Deadlines
4. CCP Data Quality Reports
5. Coordinated Assessment: Denying Referrals
6. Data Literacy Institute: Feedback and Embedded Dashboards
7. CDQI: Longitudinal System Analysis (LSA) Report

**CoC / Coordinated  
Assessment / UPLIFT /  
Bitfocus Updates**

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# HUD CE Data Elements Discussion

HUD has released some proposed data elements for the Coordinated Entry process that include HMIS data collection requirements and recommended reports.

Communities have the opportunity to provide feedback to HUD by Oct 1.

OSH would like to review the proposed feedback with agencies and gather feedback to submit to HUD. This discussion will take place during the **Coordinated Assessment Work Group on Thurs, Sept 13 from 1-2:30pm. Location: The Health Trust, 3180 Newberry Dr, Unit 200, San Jose, CA 95118.**

Please send an agency representative to this meeting who is familiar with the CE process and HMIS data collection!



# Clarity Connect Conference

Bitfocus is holding our first **Clarity Connect** conference this year from **November 19-20 in Las Vegas!**

Featuring:

- Hands-on Clarity training
- In-depth policy, coordinated entry, and data analysis training
- Meet the Bitfocus Team
- Collaborate and mingle with fellow leaders in the HMIS space

[Registration link](#) will be posted in the Agency Admin minutes

*Note: Clarity Connect is an allowable training expense for HUD Continuum of Care (CoC) and Emergency Solutions Grants (ESG) Program grantees. Grantees attending who are funded by HUD should maintain a proof of attendance and a copy of the final Clarity Connect 2018 Agenda for their files.*

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# HMIS Newsletter



# HMIS Newsletter

Will be sent out monthly to all HMIS users

**August 2018 Newsletter** included:

- LSA Prep
- Merging vs Deleting Clients
- Data Quality Lab
- Data Literacy Institute - Reporting Resources
- Report Spotlight: Program Details Report
- Upcoming Events

Web link to the newsletter will available in the Agency Admin meeting minutes



## Santa Clara HMIS News, July 2018

Welcome to the Santa Clara County HMIS Newsletter! In this edition you'll find the following:

- [Data Literacy Institute Launched This Month!](#)
- [Data Quality Lab - Part IV - Getting Services Right](#)
- [Reminder: Permanent Housing/Community Queue Cross Check](#)
- [Report Spotlight: \[HUDX-227\] Annual Performance Report \[Oct 2017\]](#)
- [Bitfocus is Hiring!](#)
- [Upcoming Events](#)

### Data Literacy Institute Launched This Month!

Starting this month, OSH, in collaboration with the CoC, launched the Data Literacy Institute. The institute will consist of a series of training opportunities and development of learning materials for the CoC and community partners. *The goal of the institute is to help staff at all levels enhance their understanding of the data collected in HMIS, how to measure program performance, and how to use data to effectively communicate the success of your programs.*

There are 2 Data Literacy tracks. Each track will feature quarterly workshops covering a different data topic. In this quarter (July - Sept), we will be holding 2 workshops for each track!

#### Agency Staff Track:

*Target Audience:* HMIS users, Case Managers, Outreach Workers, Data Entry staff, Front Desk staff... anyone at your agency interested in learning more about data!

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# Report Deadlines



# Report Deadlines

<b>Report</b>	<b>Submission Deadline</b>	<b>Notes</b>
APR / CAPER	Rolling, depending on your grant year	All submissions in Sage after 10/1 will use the 2018 version of the report
PATH Annual Report	December 31	Will be a CSV export instead of manual entry
SSVF Upload (CSV 6.11)	Sept 1 - 9, Oct 1 - 9	
RHY Upload (CSV 6.12)	TBD	

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# CCP Data Quality Reports

# CCP Data Quality Reports

- Bitfocus emailed Agency Administrators for agencies who provide Intensive Case Management (ICM) services as part of CCP
- Users with an Agency Manager license can access the reports through the Data Analysis tab in Clarity, in the Santa Clara County HMIS Reports folder
- Run the “CCP Data Quality Dashboard”

The screenshot displays the Clarity System interface. At the top, the word "System" is on the left, and navigation icons for reports, a grid, and messages are on the right. The user's name "Jenn Ong, System" and a profile icon "JO" are also visible. Below the navigation bar, there are three tabs: "REPORT LIBRARY", "EXPLORE", and "DATA ANALYSIS", with a red arrow and the number "1" pointing to the "DATA ANALYSIS" tab. The main content area shows a list of report categories with their respective counts and dropdown arrows:

Built In Reports	1 report(s) ▼
Santa Clara County HMIS Reports	5 report(s) ▼
System Reports	7 report(s) ▼

A red circle and arrow with the number "2" point to the dropdown arrow of the "Santa Clara County HMIS Reports" category. On the right side of the interface, the Clarity Human Services logo is displayed.

# Running the Report

The dashboard will include instructions on how to run the reports and download them. PDF instructions were also sent.

3 reports are included:

- **All Enrollments** - use as a program roster
- **CCP Objectives** - monitor CCP income/medical home/behavioral health services
- **Housing Service** - monitor housing location services

The screenshot shows the 'System' dashboard with the 'CCP Data Quality Dashboard' selected. The dashboard title is 'CCP Data Quality Dashboard' and it was updated '54m ago'. Below the title, there are filter settings: 'Agency Providing Case Management is "Your Agency Name"' and 'Report Period is in the past 30 days'. A 'Run' button is visible. The main content area contains the heading 'How to Run the CCP Data Quality Reports' and a paragraph explaining that the dashboard contains 3 reports to help monitor data quality. It also provides instructions on how to run the reports, including clicking the 'Filters' section and adjusting the report period.

This screenshot is similar to the one above but includes red annotations. A red arrow labeled '1' points to the 'FILTERS' section. A red box highlights the filter 'Agency Providing Case Management is equal to Your Agency Name'. Another red box highlights the filter 'Report Period is in the past 30 days'. A red arrow labeled '2' points to the 'Run' button with the text 'Update agency name and report period'. A red arrow labeled '3' points to the 'Run' button.

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# Coordinated Assessment: Denying Referrals



# General Guidelines for Denying Referrals

If your program accepts referrals through HMIS as part of Coordinated Assessment:

- Always check with the OSH MatchMaker before denying a referral:
  - PSH - Shelly Barbieri
  - RRH - Jessica Orozco
  - TH - Mona Guerrero
- When denying a referral:
  - Choose Send to Community Queue = “Yes” (unless you are instructed not to by the OSH Program Manager)
  - Try to choose the Denied Reason that best fits the situation
  - If you’d like to add a note that will help the OSH MatchMaker for future referrals (for the client or for your program), add it in the Denied Message section



# Updates

Denied Reasons have been reviewed by the OSH MatchMakers, and will be adjusted to include additional categories

When a referral is denied, the autogenerated Clarity notice will include next steps (if any) that users should take if they are still in contact with the client, or if the client returns in the future for services

Reasons for Denial	When to Use
Client could not be located <b>(NEW)</b>	You are unable to find the client after multiple attempts
Lack of Eligibility <b>(Specify in Denied Message)</b>	Client is not eligible for the program - please write the specific eligibility criteria that the client did not meet in the Denied Message
Full Capacity/No Availability	Your program is at full capacity and has no more capacity to serve the client
Client out of County <b>(previously "Client out of Jurisdiction")</b>	Client has moved out of the County and will no longer need housing services in Santa Clara County
Client currently incarcerated <b>(NEW)</b>	Client has been put in jail / prison
Client previously received services	Client has received services through this program already and is not currently eligible to receive services at this time
Needs could not be met by program	Client's needs could not be met by the program
Disagreement with rules	Upon learning program rules, client did not want to participate
Client refused services	Client did not want services
Client did not show up or call	Client was contacted, but did not follow up on phone calls or scheduled meetings
Referral time expired	Referral has been open for too long and had to be closed due to lack of progress on the referral
Client Housed - Self-Resolved <b>(renamed from Self Resolved - Client Housed)</b>	Client was able to find housing by themselves
Client Housed - through another program <b>(NEW)</b>	Client was housed through another program
Client currently in another program	Client is currently enrolled in another program
Falsification of Documents	Client provided fake documents during assessment of program eligibility
Other	Use only if the none of the other Denied Reasons apply. Describe the reason for denial in the Denied Message.
<b>RETIRED</b> Denied by Landlord/Property Manager	DO NOT USE



# Email Notifications for Denied Referrals

- If client could not be located...
  - ... if you are in contact with the client, make sure their Location and VI-SPDAT information is up-to-date
- If client is currently incarcerated...
  - ... if the client returns for services in future and is homeless, make sure their Location information is up-to-date and conduct a new VI-SPDAT
- If client was denied due to lack of eligibility...
  - ... make sure their VI-SPDAT information is up-to-date



Dear Jenn Ong,

Referral to Hello program for client D5FB4D10E has been denied by Jenn Ong

1. Update their Location tab with their latest contact information. Information on how to add Location information can be found here: <https://get.clarityhs.help/hc/en-us/articles/115000414067-How-do-I-create-and-maintain-addresses-for-my-client->
2. If it has been over a year since the latest VI-SPDAT or there has been a significant change in their status since the latest VI-SPDAT, conduct a VI-SPDAT with the client and refer them to the Community Queue if they are not already on the queue. Information on how to do this is here: <https://get.clarityhs.help/hc/en-us/articles/115000467408-Working-with-the-VI-SPDAT-V2-VI-F-SPDAT-V2-for-Centralized-Intake->

Clarity Training System tr-1 Team

Questions? Visit our online wiki: [get.clarityhs.help](https://get.clarityhs.help)

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# Data Literacy Institute: Feedback and Embedded Dashboards

# General Feedback?

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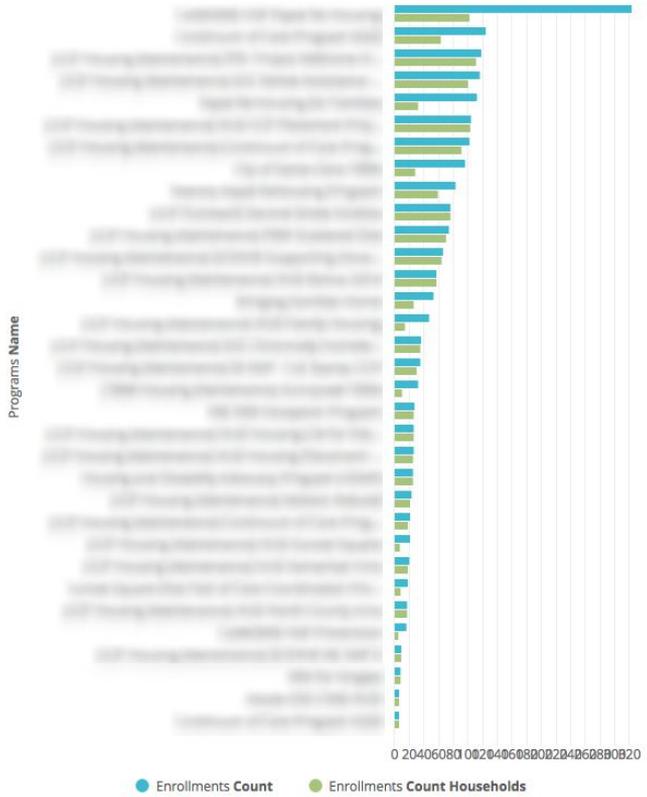
# Embedded Dashboards

Would be available to all Agency Managers when they first log in to Clarity (and accessible through a Dashboard option near the Search tab)

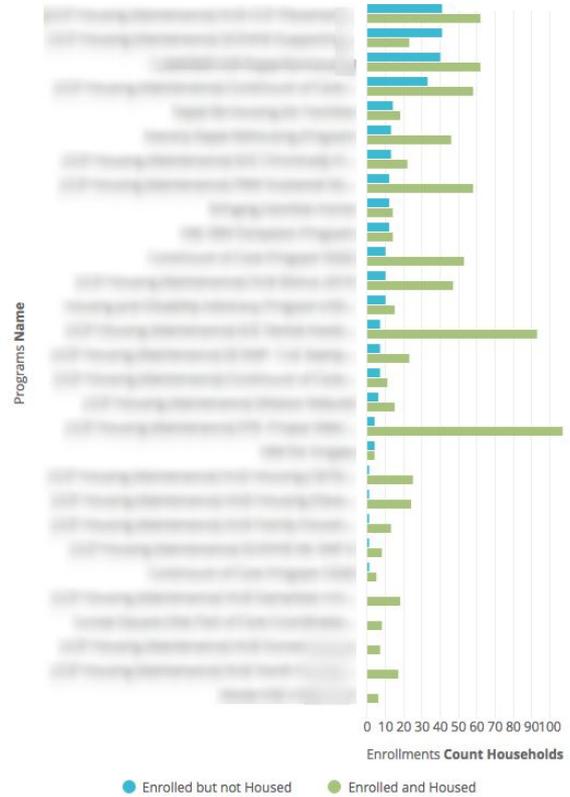
Looking for 2-3 agencies to help preview and test out a default dashboard

Looking for feedback today as well!

Count current active clients/HH by Program



Count PH/RRH with/without move in date



2  
Exits to Permanent Destinations in the last month

906  
Active Youth

912  
Active Veterans

3,213  
Chronic Homeless

8,327  
Clients with no address in Location tab



# Upcoming DLI Workshops

## Agency Staff:

- Tues, Sept 11, 1-2:30pm | HMIS Data In Action | [in person](#) or [dial-in](#)
- Wed, Nov 7, 1-2:30pm | How to Request Data | [in person](#) or [dial-in](#)
- Tue, Feb 12, 9:30-11:30am | Statistics, Charts, and Graphs | [In person](#)
- May (TBD) | Data Quality

## Agency Manager:

- Thurs, Nov 1, 1:30-2:30pm | Planning for Data Requests
- Thurs, Feb 7, 1:30-2:30pm | How to Tell Your Story
- Thurs, May 2, 1:30-2:30pm | Data Quality

Location and dial in same as HMIS Agency Admin meetings

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# CDQI: Longitudinal System Analysis (LSA) Report



# LSA Background

In the past, CoCs would submit the Annual Homeless Assessment Report (AHAR) on an annual basis. The AHAR is a national-level report that provides information about homeless service providers and people and households experiencing homelessness. It informs strategic planning for federal, state, and local initiatives designed to prevent and end homelessness.

This year, HUD has redesigned the AHAR report and replaced it with the Longitudinal System Analysis (LSA) report. The LSA will be due in late Nov / early Dec and cover the federal fiscal year of 10/1/17 - 9/30/18.

Over the next few months, we will be asking agencies to review their data to prepare for the LSA.



# LSA Overview

- Includes five project types: ES/SH/TH (reported as a combined group), RRH, and PSH
- Focuses on adults and heads of household – age is the only demographic reported for non-heads of household under 18
- Report includes data on demographics, length of time homeless, information on specific populations such as veterans and chronically homeless persons, housing outcomes
- Includes not just the federal fiscal year, but includes some historic data prior to the FY as well
- The LSA is a much larger report than the AHAR and requires the upload of a csv file instead of manually entering the data (for example, one table in the LSA is about 4 times the size of the entire AHAR report)



# This Month, Continued Focus On: Project Inventory

Let Bitfocus know if:

There have been any changes to your **bed / unit inventory** since the HIC/PIT (or your last update):

- What the new bed inventory is
- What was the date of the inventory change

**Any programs ended or started:**

- If the program ended, the end date (please make sure all clients are exited from the program!)
- If the program started, please fill out the Program Request Form (<http://scc.hmis.cc/client-forms/>)



## This Month, Continued Focus On:

- Household Review
- Move-In Date for PSH and RRH projects
- Exit Destination
- Income

This review will help both the System Performance Measures and LSA for the year covering 10/1/17 to 9/30/2018



## Additional Notes

Bitfocus is preparing to send specific data quality reports to Agency Administrators, in preparation for the LSA. Please look out for these requests via email this month!

# Households Review

Run the [GNRL-106] Program Roster for the period of 10/1/17 to 6/30/18

Review the household groups:

- If you notice that clients are missing, add them to the household.
- If clients should be grouped together, contact the Help Desk

Program Roster Report										Bitfocus System	
										Enrolled within [06/01/2017 - 11/30/2017]	
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Assessments	Services	Assigned Staff	
<i>Program: Baltimore Emergency Shelter</i>											
Larina, Tanya	128CB485D	10/11/1958	58	59	06/01/2017	07/01/2017	30	0	2	A. Admin	
Katya, Ivanove	54F117E34	10/11/1987	29	30	06/08/2017	06/08/2017	2	0	1	A. Admin	
Katya, Ivanove	54F117E34	10/11/1987	29	30	09/01/2017	09/01/2017	0	2	0	A. Admin	
Gnatenko, Tatyana	CE74C00E6	12/11/1948	68	68	06/01/2017	06/13/2017	12	0	1	A. Admin	
Gnatenko, Lena	86890AD3B	12/10/1958	58	58	06/01/2017	06/01/2017	0	0	0	A. Admin	
Gnatenko, Ivar	F2A73252C	10/10/1948	68	69	06/01/2017	06/01/2017	0	0	0	A. Admin	
Rick, Ilona	379D9DA8B	12/10/1958	58	58	06/01/2017	06/01/2017	0	0	0	A. Admin	
Rick, Lisa	5F6EA0FE1	12/11/1928	88	88	06/01/2017	06/13/2017	12	0	1	A. Admin	
Rick, Ostap	2CC318F74	10/10/1928	88	89	06/01/2017	06/01/2017	0	0	0	A. Admin	
Katya, Ivanove	54F117E34	10/11/1987	30	30	10/24/2017	10/24/2017	0	0	0	A. Admin	
McFly, Lorraine	F0FDDFOC9	05/09/1952	65	65	07/13/2017	07/13/2017	0	0	0	A. Admin	
McFly, George	066D45587	10/01/1950	66	67	07/13/2017	07/13/2017	0	0	0	A. Admin	
Katerinka, Alson	D91FEB7E8	10/10/1980	36	37	07/01/2017	07/01/2017	0	0	0	A. Admin	
Kate, Alson	07D7D9F73	-	-	-	07/01/2017	07/01/2017	0	0	0	A. Admin	
Katya, Testscreen	06C75DF7D	10/11/1987	29	30	08/02/2017	08/02/2017	0	0	0	A. Admin	
Ivanova, Katya	94DD95487	10/01/1985	31	32	06/01/2017	06/01/2017	0	0	0	A. Admin	
Katya, Testemailtemplates	8DCE26718	10/11/1987	29	30	06/01/2017	06/01/2017	0	0	0	A. Admin	
Kate, Alson	07D7D9F73	-	-	-	11/10/2017	-	20	0	0	A. Admin	
Mouser, Michael	F08851A1B	10/10/1985	32	32	11/15/2017	-	15	0	0	M. Shaw	
Mouser, Micky	A4588D705	02/25/2013	4	4	11/15/2017	11/16/2017	1	0	0	M. Shaw	

# Housing Move-In Date

Run the [GNRL-106] Program Roster for the period of 10/1/17 to 6/30/18

For PSH and RRH programs, check the Housing Move-In Date

- If household moved into housing and the Housing Move-In Date is “undefined”, the Housing Move-In Date needs to be added
- If the Housing Move-In date is not accurate (e.g. is before the program start date), it should be updated

Program Roster Report								Jenn Test Agency			
								Active within [05/01/2017 - 05/02/2018]			
Housing Move-In: Undefined = Unknown HoH or Move-in is Null, <input type="checkbox"/> = Non PH Project											
Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assessments	Services	Assigned Staff
<b>Program: EAP Demo Program</b>											
Kitty, Hello	1C8A64AFD	01/01/1980	37	38	07/01/2017	-	306		0	3	J. Ong
Bombadil, Tom	77FAD8A1B	01/01/1900	-	-	07/01/2017	-	306		0	1	J. Test5
<b>Program: Jenn Test HP Prevention Program</b>											
Potato, Hot	BE2456D1C	01/01/1980	38	38	01/02/2018	-	121		0	1	J. Ong
<b>Program: RRH</b>											
Bombadil, Tom	77FAD8A1B	01/01/1900	-	-	11/01/2015	-	914	undefined	0	0	J. Ong
Cotta, Ri	3B830C101	01/01/2010	5	8	11/01/2015	-	914	undefined	0	0	J. Ong
Tea, Ginger	53Q20163C	02/01/2015	0	3	11/05/2015	-	910	undefined	0	0	O. Jenn
Tea, Jasmine	6A120C62D	01/01/1998	17	20	11/05/2015	-	910	undefined	0	2	O. Jenn
Lo, He	9A22165C7	01/01/1975	40	43	11/01/2015	-	914	undefined	0	0	J. Ong
Lo, Je	BAD9F1241	01/01/1975	40	43	11/01/2015	-	914	undefined	0	0	J. Ong
Client, Hello	E869E4460	01/01/1980	37	38	03/01/2017	-	428	undefined	0	0	J. Ong
Daniel, Dear	996EDFD20	01/01/2015	2	3	08/01/2017	-	275	undefined	0	2	J. Ong
Kitty, Hello	1C8A64AFD	01/01/1980	37	38	03/01/2017	-	428	undefined	0	3	J. Ong
Cat, Allie	9FFB3597F	01/01/2010	7	8	09/01/2017	-	244	undefined	1	0	J. Ong
Cat, Bob	901BCEED5	01/01/2010	7	8	09/01/2017	-	244	undefined	1	2	J. Ong
Cola, Coca	171F67E3C	01/01/2000	17	18	09/01/2017	09/21/2017	20	undefined	0	0	J. Ong
Cola, Ri	4152D2D03	01/01/1980	37	38	09/01/2017	09/21/2017	20	undefined	1	0	J. Ong
Client, Anonymous	EEC147421	-	-	-	10/01/2017	-	214	undefined	0	0	J. Ong
<b>Program: CoC Outreach</b>											
Bombadil, Tom	77FAD8A1B	01/01/1900	-	-	07/01/2017	-	922		0	0	J. Ong

# Destination and Income

1. Run the [HUD-225] HMIS Data Quality Report for your programs

Choose Program Type(s)

Choose...

All

Emergency Shelter

Transitional Housing

PH - Permanent Supportive Housing (disability required)

Street Outreach

Services Only

Other

Safe Haven

PH - Housing Only

PH - Housing with Services (no disability required)

Day Shelter

Homeless Prevention

PH - Rapid Re-Housing

Coordinated Assessment

Choose Program Types in gray

Choose Program Status

All Programs

Choose All

Choose Program(s)

Choose...

All

Demo RHY Program

Demo SSVF Program (RRH)

Demo Standard CoC Program

Outreach

Choose Programs you want to review

Enter the starting report date

2015/10/01

Use 10/1/2017

Enter the ending report date

2016/09/30

Use 5/31/2018

Choose Report Mode

Regular Report

Choose Report Format

Web Page  PDF  Excel

Choose Web Page

2. Review Q4 (Destination and Income)

Q4. Income and Housing Data Quality		
Program Applicability: All Projects		
Data Element	Error Count	% of Error Rate
Destination (3.12)	28	4.99%
Income and Sources (4.2) at Entry	7	0.77%
Income and Sources (4.2) at Annual Assessment	185	74%
Income and Sources (4.2) at Exit	7	2.47%



# Destination: What to look for

## Issue:

On the Program End screen, “Destination” is:

- Client doesn't know
- Client refused
- No exit interview completed
- Data not collected
- Missing

## How to fix:

If the client's exit destination is known, update the “Destination” on the Program End screen

### End Program for client Bunya Cotta

Program Exit Date	12/14/2015 
Housing Status at Exit	Category 1 - Homeless 
Destination	Data not collected 

# Income at Entry/Exit: What to look for

## Possible Issues:

1. “Income from Any Source” is:

- Client doesn’t know
- Client refused
- Data not collected
- Missing

OR

2. “Income from Any Source” is Yes, but no specific income sources are checked

## How to fix:

1. On the Enrollment or End screens, update “Income from Any Source” question
2. If a client does receive income, make sure to report the type of income (and the amount)

Cash Income for Individual	
Income from Any Source	<input checked="" type="checkbox"/>
Earned Income	<input type="checkbox"/>
Unemployment Income	<input type="checkbox"/>
Worker's Compensation	<input type="checkbox"/>
Private Disability Insurance	<input type="checkbox"/>
VA Service-Connected Disability Compensation	<input type="checkbox"/>
Social Security Disability Income (SSDI)	<input type="checkbox"/>
Supplemental Security Income (SSI)	<input type="checkbox"/>
Social Security Retirement	<input type="checkbox"/>
VA Non-Service Connected Disability Pension	<input type="checkbox"/>
Employment Pension	<input type="checkbox"/>
TANF (Temp Asst for Needy Fam)	<input type="checkbox"/>
General Assistance (GA)	<input type="checkbox"/>
Spousal Support	<input type="checkbox"/>
Child Support	<input type="checkbox"/>
Other Cash Income	<input type="checkbox"/>
Total Cash Income for Individual	0.00

**If Income = Yes, check off the income source(s) received**



# Income at Annual Assessment

## Possible Issues:

Same issues as Income at Entry or Income at Exit

OR

Annual Assessment is not entered correctly

## How to fix Annual Assessment:

1. If the client has been in the program for more than a year, make sure an Annual Assessment was completed
2. Make sure Annual Assessment is dated within 30 days before / after the anniversary of program entry

# Next Month's Meeting Time and Location

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# Next Agency Admin Meeting: Thurs, Oct 4 from 2:30-3:30pm

**At our regular meeting location:** Sobrato Conference Center, Milpitas  
600 Valley Way, Room 1  
Milpitas, CA 95035

The **Performance Management Work Group** will take place right before it, from 1:30-2:30pm, in the same location.

Dates and locations for 2018 meetings are listed on the OSH website:

<https://www.sccgov.org/sites/osh/continuumofcare/osh-events/pages/home.aspx>

**Q&A**

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