



**SCC Technical Administrator (TA)/Agency Lead Meeting  
Thursday, November 2nd, 2023**



## Getting to Know You!

*If you could live anywhere for one year, where would it be?*

# Meeting Objectives



## UPDATES

- UPLIFT Updates
- HMIS Newsletter
- MyConnnectSV



## IN THE KNOW

- 2023 User Satisfaction Survey
- LSA Updates
- Sharing Settings
- November Feature Focus



## MEMOS

- End User 60-Day Inactivation
- SCC HMIS Quarterly Compliance Certification Checklist
- Data Standards – Report Status
- Holiday Schedule
- Next Months Meeting

# UPDATES



# UPLIFT UPDATES

## AVAILABILITY

- **No more UPLIFT passes available for Q2**

- 98% of UPLIFT stickers (passes) have been issued
- The remaining 2% of passes are currently being processed; first-come, first-serve

## REMINDERS

- We are unable to obtain additional replacement stickers (passes) from VTA
- If a client no longer needs their pass and the sticker is still *unused*, please notify us so we can reassign the sticker to another client in need
- We are still able to replace badges only (badges only usable if client already has their own sticker)

## REPLACEMENTS

If a replacement badge is needed, please make a request for a "Badge Only" on HMIS and notify [UPLIFT@hhs.sccgov.org](mailto:UPLIFT@hhs.sccgov.org)

## UPCOMING EVENTS *NOVEMBER 2023*

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
		1	2 <a href="#">2pm HMIS TA/Agency Lead Meeting</a>	3 <a href="#">CoC Membership Meeting</a>
6	7	8 <a href="#">9:30am Service Providers Network Meeting</a>	9 <a href="#">10am HMIS Clarity Office Hours</a>  <a href="#">1pm Coordinated Entry Work Group (CEWG)</a>	10
13 <a href="#">2pm SCC HMIS Looker Office Hours</a>	14 <a href="#">10am Data Think Tank</a>	15	16 <a href="#">9am VI-SPDAt In-Person Training</a>	17
20	21	22	23 <b>Bitfocus Holiday &amp; SCC Holiday</b>	24 <b>Bitfocus Holiday &amp; SCC Holiday</b>
27 <a href="#">2pm SCC HMIS Looker Office Hours</a>	28	29 <a href="#">10am SCC TA Office Hours</a>	30 <a href="#">3pm Rapid Rehousing &amp; Employment Initiatives Meeting</a>	31



# HMIS NEWSLETTER



Santa Clara HMIS News  
October 2023

Welcome to the Santa Clara HMIS September 2023 newsletter!

**In this edition you'll find the following:**

- Check Out This Fun Poll: [As many holidays approach, what's your favorite fall to winter-time holiday?](#)
- Data Standards FY 2024 - Race & Ethnicity
- Report Spotlight - Available Reports
- 2023 User Satisfaction Survey
- [SCC HMIS Quarterly Compliance Certification Checklist - DUE 10/31/2023](#)
- [MyConnectSV Launch!](#)
- Common Error Review: Group Enrollments
- Work Readiness Assessment (WRA)
- Federal Reporting
- Meeting/Upcoming Events - Upcoming Holiday
- Bitfocus is Hiring

# MyConnectSV

Join us in celebrating the launch of MyConnectSV.org!



TUESDAY,  
**NOVEMBER 7<sup>TH</sup>**  
11AM - 3PM

at Northeast corner of  
**ST JAMES PARK**



## How can I learn more about MyConnectSV?

- Checkout the provider resources and trainings [here](#)

## How can my client learn more about MyConnectSV?

- Invite them to the MyConnectSV Launch party on November 7th in St. James Park! [Click here to check out the details.](#)
- Share [MyConnectSV.org](https://MyConnectSV.org) with them so that they can learn how to use the new tool and what the benefits are for them!

# IN THE KNOW



# 2023 User Satisfaction Survey

*Lessons Learned*

A photograph of wooden blocks spelling out the word "GOALS" on a wooden surface. The blocks are arranged in a row, with the letters G, O, A, L, S. The G block has a subscript 2, and the O, A, L, and S blocks have subscript 1. Other blocks with letters like Y, J, W, F, E, L, and A are scattered around.

## Understanding the results of the Annual Survey

Changes & Improvements for Next Year

# What's Working and Not Working

## WORKING

Program-based reports are most frequently used  
(Examples include Program rosters and Program Data Review)

Next most frequently used report is HUDX-225 Data Quality report

User's duration and experience with HMIS have remained the same

Satisfaction with Help Desk Support and the Community Administration team remain high

## NOT WORKING

*Additional training is needed for users to be more confident running reports*

WHAT IS THE LSA



HOW TO PREP.



REPORTS TO RUN



# LSA UPDATES

# LSA UPDATES

REPORTS TO RUN

HOW TO PREP.

HUD's Longitudinal Systems Analysis (LSA) is a report submitted to HUD annually that includes a complex analysis across key projects participating in the Continuum of Care (CoC) Homelessness Management Information System (HMIS)

The LSA replaced the Annual Homeless Assessment Report's (AHAR) data component in the 2018 reporting year

# LSA UPDATES

## **What Can Your Agency Do to Prepare for LSA and System Performance Measures?**

The System Administration team may reach out to verify or correct data about your program and/or clients

Please look out for those emails and respond promptly

We truly appreciate the hard work your community does to maintain data that is complete, accurate, and timely!

REPORTS TO RUN

# LSA UPDATES

Run the [\[HUDX-225\] HMIS Data Quality Report](#)

Run the [\[GNRL-106\] Program Roster](#)

Run the [\[GNRL-220\] Program Details Report](#)

Review Bed Inventories and Utilization rates for accuracy. Ensure an accurate number of beds and units are listed throughout the year for your shelter and housing programs

Utilization rates should be between 90-105%

For Night-by-night (NbN) Shelters, please resolve any missing exits or abandoned enrollments

- 
- October 1<sup>st</sup>, 2023, Reporting Year Begins
  - November 1<sup>st</sup>, 2023, LSA Data Collection Opens
  - November 14<sup>th</sup>, 2023 Data Quality Review Due
  - November 18<sup>th</sup>, 2023, LSA Draft Deadline
  - Jan 11<sup>th</sup>, 2024, LSA Final Deadline for Submission

# File Sharing Settings Update

*Changes to Expect in November 2023*

# Working with Files in the Client Record

## Benefits of File Sharing

- Files uploaded to a client record can be shared between agencies or kept private
- There's no limit to the number or format of files staff members can upload

## Examples of how an Agency might use this feature

- Uploading third-party documentation of homelessness
- Scanning and storing forms of client identification
- Keeping agency agreements and signed policies
- Sharing files as part of the community's Coordinated Entry process

# Agency and Program Settings

- Files can be uploaded at the Program-level or at the Client Profile-level
- If you mark a File as **PRIVATE** during upload process, only other staff at your agency will be able to see that file

# Adding Client Files in HMIS

## Luke Skywalker

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES **FILES** CONTACT LOCATION

### CLIENT FILES

**ADD FILE** (+)

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**Personal Identification:Driver's License or State ID Card**  
by Angie Evans on 26 May, 2023, 750.561 KB  
System

[MODIFY FILE](#) | [DELETE FILE](#)

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**Family, Social and Legal:Alimony Agreement**  
by Angie Evans on 26 May, 2023, 383.021 KB  
System

[MODIFY FILE](#) | [DELETE FILE](#)

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# Adding Client Files in HMIS

Luke Skywalker

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

UPLOAD A FILE

Category Family, Social and Legal

Predefined Name Alimony Agreement

File

Trouble attaching files? Switch to the [Basic Uploader](#)

Private  Use this **PRIVATE** toggle to prevent other agencies from seeing the client file

Hide from Customer Portal



# Data Collection Requirements

There are no requirements around file uploads in the HUD HMIS Data Standards, however, there are limits designated by the client outlined within the Release of Information

# Data Collection Requirements - ROI

Client initials	Type of PPI/PHI
	<ul style="list-style-type: none"> <li>Identifying information (including: name, birth date, gender, race, ethnicity, social security number, phone number, residence address, or other similar identifying information)</li> </ul>
	<ul style="list-style-type: none"> <li>My photograph or other likeness</li> </ul>
	<ul style="list-style-type: none"> <li>Medical information included in my responses to questions asked as part of the standard HMIS intake and identification as a client or patient of the Santa Clara Valley Health and Hospital System</li> </ul>
	<ul style="list-style-type: none"> <li>HIV/AIDS-related information included in my responses to questions asked as part of the standard HMIS intake</li> </ul>

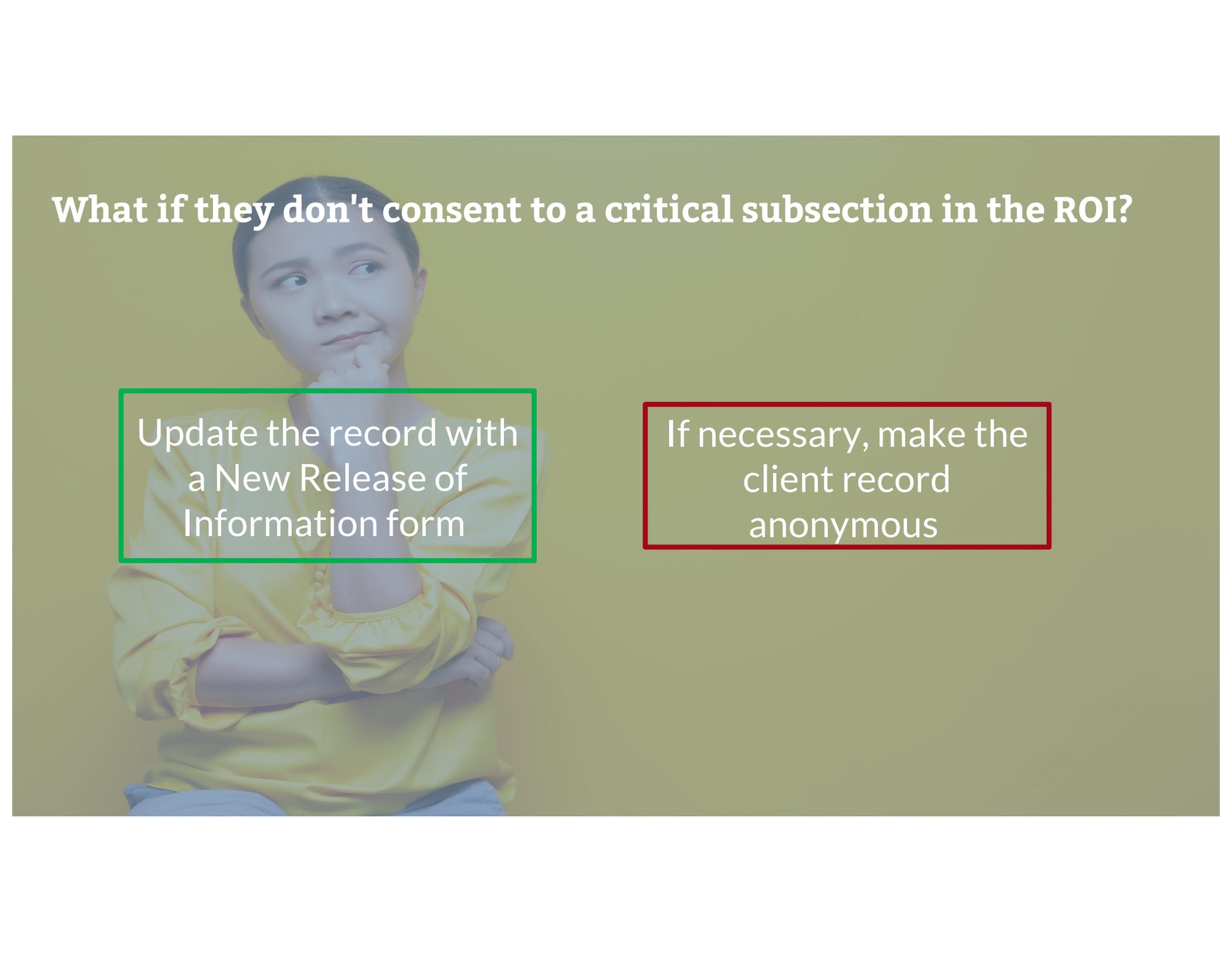
Version 2023\_March\_19

This form may not be amended or modified except on approval of the County of Santa Clara's Office of Supportive Housing.  
Please send all requests for changes to [sccsupport@bitfocus.com](mailto:sccsupport@bitfocus.com).

CLIENT CONSENT TO DATA COLLECTION AND ROI

Page 3 of 6

	<ul style="list-style-type: none"> <li>Mental health information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving mental health services from the County's Behavioral Health Services Department</li> </ul>
	<ul style="list-style-type: none"> <li>Substance abuse treatment information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving substance abuse or alcohol treatment from the County's Behavioral Health Services Department</li> </ul>

A woman with dark hair, wearing a yellow long-sleeved top, is shown in a thoughtful pose with her hand on her chin. The background is a solid olive green. Two text boxes are overlaid on the image: a green-bordered box on the left and a red-bordered box on the right.

**What if they don't consent to a critical subsection in the ROI?**

Update the record with  
a New Release of  
Information form

If necessary, make the  
client record  
anonymous

# Resources

## Bitfocus Training

Here you can find your Bitfocus community-specific training resources.



### Working with Files in the Client Record

Working with Files in the Client Record

REGISTER | FREE

Share Tweet

The screenshot shows a web browser window with the URL [scc.bitfocus.com/forms-manuals](https://scc.bitfocus.com/forms-manuals). The page header includes the Santa Clara County logo and navigation links: Home, About Us, Training, TA/Agency Lead Info, and Resources. The main content area is titled "Client Consent Forms & Guides" and lists several resources with checkmarks:

- ✓ [Client Consent To Data Collection And ROI](#) *Revised March 2023*
- ✓ [SCC ROI FAO Sheet](#)
- ✓ [SCC ROI Completion – Instructions Guide](#)
- ✓ [How to add an Electronic Signature ROI \(PDF\)](#)
- ✓ [Client Consent and Coordinated Assessment: What can I enter into HMIS?](#)
- ✓ [Client Consent and the VI-SPDAT: What can I enter into HMIS?](#)
- ✓ [Client Consent and the HPAT: What can I enter into HMIS?](#)

### General Trainings

CHECK IT OUT

### Santa Clara County

CHECK IT OUT

# NOVEMBER FEATURE FOCUS

REFERRALS

Pending Community Queue Completed Denied Sent Availability Unit Queue

Community Queue

Community Queue Shelter Queue PSH Queue

Eligible Clients Only

Date 09/14/2023

Mode Standard

Sort By Default

SEARCH

Client	Referral Date	Days Pending
Tia Test Referred by ABC Agency	08/21/2023	20

## Community Queue Date Filter

The Community Queue will now include a **Date** filter that allows users to search for referrals on the queue from the selected date

For example, if a user sets the **Date** to September 14, the search results will include referrals sent to the queue on or before September 14 that had not been reassigned or otherwise removed from the queue as of September 14

The **Date** filter is set to the current date by default, but can be set to either a past or future date

If the date field is empty, users will see referrals from on or before the current date

The **Reassignment Date** in the REASSIGN section of a referral will be the same as the date that is entered in the **Date** filter

Users can select a different date



# MEMOS

# END USER 60-DAY INACTIVATION

## NEW! Inactive User Policy

- Access disabled after 60 Days of Inactivity
- Users must log in to their account every **60 days**, or their account will be **deactivated**
- The system will notify the user by email (used in HMIS) that their account has been disabled

## How To Regain Access

- End User can contact the Help Desk ([sccsupport@Bitfocus.com](mailto:sccsupport@Bitfocus.com)) to have account reactivated
- Once reactivated by Help Desk, the user **MUST** log in ASAP, as the account will revert to inactive overnight without login

# SCC HMIS Quarterly Compliance Checklist - **Due 10/31/2023**

Quarter 3  
July - Sep 2023

New Staff (only)  
added to HMIS  
during Q3

Lists of End  
Users Impacted  
has already  
gone out please  
only submit  
certification for  
staff listed

Deadline was  
**Tuesday,  
October 31st,  
2023, EOB**

Staff at your  
agency who are  
not certified will  
be made  
inactive until  
submission of  
certification is  
received

More details can  
be found [here!](#)

# DATA STANDARDS REPORT STATUS



β

All Bitfocus-maintained reports with the phrase "BETA" required 2024 Data Standards updates and now conform to the new data requirements



All Bitfocus-maintained reports with the phrase "RETIRED" still require 2024 Data Standards updates and will be updated during the month of October.



NO CHANGE

Reports with no phase indication are up-to-date and did not require changes  
To learn more about Pentaho reports, [visit HelpDesk's article on our Report Library](#)

# DATA STANDARDS REPORT STATUS - Custom Reports

## Updated in October

Custom Report  
[SCC-112] HP Outcomes  
Report - FY2024 Updates

## Updated by end of Calendar Year

Custom Report  
[SCC-107] ES/TH Utilization  
Report - FY2024 Updates

Custom Report  
[SCC-117-AD] System  
Performance Measures  
Report [FY 2022] - FY2024  
Updates

# HOLIDAY SCHEDULE



Bitfocus  
Closed

- Thursday, November 23<sup>rd</sup> and Friday, November 24<sup>th</sup> in observance of Thanksgiving

Help Desk  
Availability

- Skeleton Crew
- Limited Availability via Email
- Please submit requests, but be patient



# Next Month's Meeting

Thursday, December 7th, 2023