March 2026 TA/Agency Lead Minutes

MEETING OBJECTIVES

UPDATES

- CoC Updates
- UPIFT Updates
- HMIS Newsletter

IN THE KNOW

- HIC/PIT
- MyConnectSV Feature Updates
- Clarity February Feature Updates

MEMOS

- Disabling Conditions DQ
- Recently Assessed & Not on CHQ
- Q & A Time
- Next Month's Meeting

UPDATES

CoC Updates – Community Plan to End Homelessness

- The updated Community Plan to End Homelessness is being drafted based on gaps analysis and input from a Steering Committee, Cities, the County, the CoC Board, and a Lived Experience Workgroup
    - 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
- There will be 4 regional convenings and targeted focus groups for key subpopulations
    - We will get you all information soon for the convenings
    - Our ask is that you share with your networks and invite people to come and give input

CoC Updates – Coordinated Entry Redesign Pilot

CAT Pilot Phase

- 8 agencies and ~50 assessors are participating. Agencies include: PATH, HomeFirst, LifeMoves, Abode, BWC, Community Solutions, South County Reentry Center, and United Effort Organization
- Gathering between 750- 1,000 CATs (7-9 month timeline expected)
- Robust data collection approach recommended by **Prioritization Committee**

Upcoming Events

March 2026

MON	TUES	WED	THURS	FRI
2 2pm SCC Looker Office Hours	3	4	5 HMIS Technical Administrator (TA)/Agency Lead Meeting	6
9	10 10am Data Think Tank	11 9:30am Service Providers Network Meeting	12 10am SCC Clarity Office Hours	13
16 2pm SCC Looker Office Hours	17	18	19 2:00pm NOFO Committee Meeting	20
23	24	25 10am SCC TA Office Hours	26 10am SCC Clarity Office Hours 1:00pm PMWG	27 9am SCC CoC VI-SPDAT Training
30 2pm SCC Looker Office Hours	31			

UPLIFT Updates

FY 2026 Q4 April – June
BEFORE THE QUARTER STARTS

- Exit ALL clients who did not receive a pass (sticker) from your agency last quarter. These clients will need to have a new enrollment form submitted the next time they need a pass
- Only clients who received a pass last quarter from your agency are considered "continuing clients" and can have a status assessment submitted.

REQUESTING PASSES

- New Client = **Enrollment form**
- Continuing client = **Status assessment** (make sure

they received a pass last quarter under "Program Service History")

- MUST be dated **3/20/2025 or onward**
- Quarter: **Apr-Jun**
- 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
- Wrong Assessment
- Unusable Photo
- No Client Name
- RIO (Outdated, permission denied)

Allocation Surveys
UPLIFT PROGRAM COORDINATORS ONLY

➢ Allocation surveys will be sent out soon
➢ Due 3/18
➢ Final allocations sent 3/19
➢ Email UPLIFT@osh.sccgov.org if the program coordinator at your agency changed

HMIS Newsletter
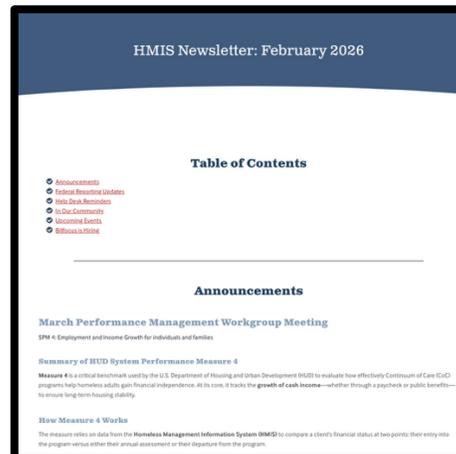
IN THE KNOW
Federal Reporting HIC/PIT
Data Quality Outreach

- Emails with DQ changes will continue
- Deadlines Provided; be sure to submit by then
- Need Help? Contact Us ASAP
- Join Office Hours or Schedule 1-1 when needed

Missing Bed Nights
Project Type: Emergency Shelter – Night by Night
A **Bed-Night Date** indicates the client has utilized a bed in a *night-by-night emergency* shelter on that date
There **must be a record of a bed night** on the project start date into the shelter; any additional bed night dates must be after the Project Start Date and before the Project Exit Date.

Overlapping Enrollments

Missing HoH

- No head of household is designated
- More than one client in a group enrollment is designated as head of household
- The client in a group enrollment designated as head of household has an enrollment date after others in the group or an exit date before others in the group enrollment
- The client designated as head of household is a young child or has an incorrect DOB making them appear to be a minor

Low/High Utilization

- Utilization less than 65% needs an explanation or a revised BUI
- Utilization may be impacted by missing Move-in Dates and Bed Nights
- Utilization over 105% needs an explanation or a revised BUI

Move-in Dates

- Documents the date a household is admitted into a permanent housing project
- This date is critical to Housing Inventory Count (HIC) and Point-in-Time (PIT) counts

- Differentiates households which have already moved into permanent housing from households which are enrolled in a Permanent Housing project but are still experiencing literal homelessness (in Emergency Shelter, Safe
- Haven, Transitional Housing, or on the street) as they prepare to move into an available unit
- The enrollment must have one and only one *Head of Household* designated
- The HoH entered the project on or before the date, all other household members entered
  - A Move-*in Date* is required for the HoH

Helpful Reports

- **[HUDX-225] HMIS Data Quality Report to review data quality**
- **[GNRL-220] Program Details Report** To review all client-level data
- **[GNRL-106] Program Roster** To review enrollment, exit, and housing move-in dates
- **[HSNG-108] Housing Census** To review bed nights and maximum bed occupancy (from the bed & unit inventory configured for the program)
- **[HUDX-123-AD] Housing Inventory (HIC) Supplemental** The Housing Inventory Count Supplemental report is designed to be used as a tool to review housing inventory available in a community

MyConnectSV Feature Updates

- Multi-select Fields on Assessments
- With this update, assessments with multi-select fields for client users of the Customer Portal now show checkboxes. Previously, clients would need to hold

"cntrl/command" to select multiple fields when selecting more than one field.

- Additionally, if a user selects ***Client doesn't know***, ***Client prefers not to answer***, or ***Data not collected*** **in the multi-select field, then any other response options are unselected.**

Location Photos

- With this update, Clarity users and Customer Portal client users can upload photos to Location tabs in the current interface (Clarity users), the new Clarity interface (Clarity users), and the Customer Portal (client users). This will allow case managers to quickly and accurately locate their clients who may not have easy-to-find addresses/locations.
- This is the update for the current interface functionality and the Customer Portal functionality.

Client Supplied Contact Records

The Customer Portal has been updated to allow Customer Portal client users to add their own contacts. A new **Contacts** tab has been added to the left sidebar.

Client Supplied Contact Records

- Client users of the Customer Portal now can update their profile photo. If the user updates their photo, that photo will be visible in both the Customer Portal and on their profile in Clarity.
- This feature includes updates to Customer Portal settings, Clarity user experience and client user experience.
- Photos needing to be approved in Clarity once they're uploaded–care team members will get notified by email and clarity inbox if a new profile pic

has been uploaded that they need to approve

Clarity Feature Updates – Disabling Condition Warning Message

- Warning Message Consolidation
- Previously, two separate validation warnings used the exact same text but were triggered by different sets of conditional logic. The shared message informs users of a mismatch between a general status and specific details:
- The Issue: The system detects that "Disabling Condition" is marked as "Yes," but the user has failed to select any specific disability types.
- The Instruction: Users are prompted to either change the "Disabling Condition" status or select at least one specific disability type to resolve the error.

This update aligns with HUD's HMIS Data Standards, which define a Disabling Condition as a physical, mental, or emotional impairment–including those caused by brain injury, post-traumatic stress disorder, or alcohol/drug abuse–that meets the following criteria:

1. It is expected to be of indefinite duration or long-continuing.
2. It substantially impedes the person's ability to live independently.

3. The individual's condition could be improved by more suitable housing conditions.

The new single warning reads:

"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."

MEMOS

Disabling Condition DQ

Please note DQ around MISSING or DATA ERRORS for Disabling Conditions has commenced

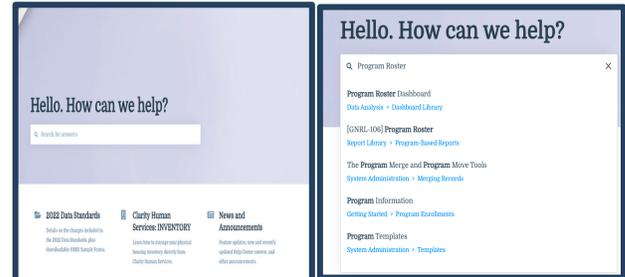Emails have gone out – please review these and make necessary updates by deadline

- ✓ Active Clients should be fixed; if you are still working with these clients, you should be able to make updates
- ✓ Inactive clients should at least be reviewed and updates made where possible

RECENTLY ASSESSED & NOT ON CHQ
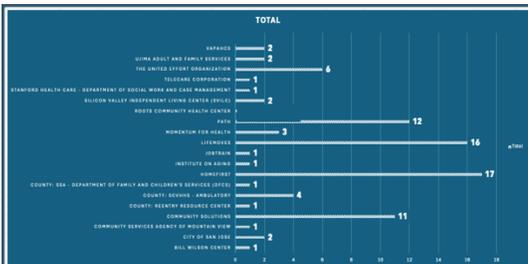
Resources
Clarity Human Services Help Center

Link to page embedded in image!
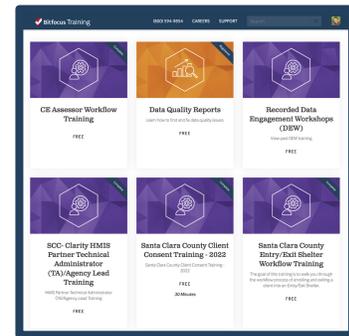
Link to page embedded in image!

- • 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)

March 2026 TA/Agency Lead Minutes

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.

Your ideas count! Make a Suggestion!
Okay! press ENTER

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, April 2, 2026**
Time: 2:00pm – 3:30pm
Dates and locations for 2026 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
888.866.1533 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	Will Hoffer
Amigos de Guadalupe	Aurora Olivares

March 2026 TA/Agency Lead Minutes

Bible Way / Destiny	Aretha Cromwell
Bill Wilson Center	Laura Foster
Bill Wilson Center	Randi Rosen
California Youth Outreach	Anthony Ortiz Jr.
California Youth Outreach	Julian Delgadillo
Carry the Vision (CTV)	Renee Ridgway
Catholic Charities	Jesse Aguirre
City of San Jose	Marcell Leath
Community Hotline	Harjeet Reehal
Community Services Agency of Mountain View	Ariana Gomez
Community Solutions	Lindsay Mullins
ConXion to Community	Caroline Mireles-Sailor
County of Santa Clara: SCVHHS – Public Health	Alan Garate
County: OSH	Juan Hernandez
County: OSH	Leila Qureishi
County: OSH	Taylor David
County: SCVHHS - Ambulatory	Andrea Medellin
County: SCVHHS - Ambulatory	Rebecca Siqueiros
County: SCVHHS - BHSD	Jeremy Golden
County: SCVHHS - BHSD	Kalie Brewster
County: SSA - DEBS General Assistance	Angelica Garay
Family Supportive Housing	Alex Le
Gardner Health Services	Jovani Quinones
HomeFirst	Alisha Parret
Institute on Aging	Christina Strine
International Children Assistance Network (ICAN)	Kit Nguyen
Jewish Family Services of Silicon Valley	Tom Marx
JobTrain	Brodie Storey
LifeMoves	Carmen Kapanga
LifeMoves	Juan Hernandez

Move Mountain View	Taly Leibovici
Nation's Finest	Kim Decker
Pear Suite, Inc.	Kawehi Kea-Scott
Sacred Heart Community Service	Paulina Soto
Sacred Heart Community Service	Paulina Soto (deleted)
Salvation Army	Owen Persons
San Jose State University Research Foundation (SJSU)	Jesse Mejia
Santa Clara County Office of Education (SCCOE)	Emiko Taylor
School Health Clinics of Santa Clara County	Rose Anne Pierre
South County Community Services	Jose Macias
St. Andrew's Residential Programs for Youth (STAR)	Vicky Taylor
Sunday Friends Foundation	Angel Garcia-Martinez
The United Effort Organization	Carolyn Stratton
VAPAHCS	Maria Magallanes
WeHOPE	Anita Blount