



April 2026 TA/Agency Lead Minutes

MEETING OBJECTIVES

UPDATES

- CoC Updates
- UPIFT Updates
- HMIS Newsletter

IN THE KNOW

- HIC/PIT DQ
- Annual SCC Client Consent & MCSV Training
- SCC Quarterly Compliance Checklist Q1 (Jan. – Mar.)
- Importance of Email Address in HMIS

MEMOS

- New Help Desk Ticket Per Issue
- Recently Assessed & Not on CHQ
- Q & A Time
- Next Month's Meeting

UPDATES

CoC Updates - Community Plan to End Homelessness

Convenings Planned Throughout the County

Tuesday, April 28, 6-8pm in South County

Community Agency for Resources Advocacy and Services

Wednesday, April 29, 6-8pm in West Valley

Campell Community Center

Thursday, April 30, 6-8pm in North County

Mitchell Park Community Center, El Palo Alto Room

Thursday, May 14, 6-8pm in San Jose

Roosevelt Community Center

Details, Flyers, and Registration Links [available here!](#)

Upcoming Events

April 2026				
MON	TUES	WED	THURS	FRI
		1	2	3
			HMIS Technical Administrator (TA)/Agency Lead Meeting	
6	7	8	9	10
		9-10am Service Providers Network Meeting	10am SCC Chxty Office Hours	
13	14	15	16	17
Zoom SCC Locker Office Hours	10am DATA THINK TANK	10am SCC CoC - Fair Housing & Tenant Rights Training Series		
20	21	22	23	24
		9am SCC CoC/MSH/SPM Training 10am SCC CoC - Fair Housing & Tenant Rights Training Series	1:00pm Performance Management Work Group	
27	28	29	30	
Zoom SCC Locker Office Hours		10am SCC/TA Office Hours		

UPLIFT Updates

FY 2026 Q4 April - June

ENSURE ALL ENROLLMENTS/STATUS ASSESSMENTS ARE UPDATED FOR THE CURRENT QUARTER

- New Client = Enrollment form
- Continuing client = Status assessment (make sure they received a pass last quarter under "Program Service History")

UPLIFT PROGRAM COORDINATOR/PICKUP LIST UPDATE

We will be reaching out to UPLIFT program coordinators this month to ask them to:

1. Confirm their contact information and active staff members.
2. Confirm who is allowed to pick up passes at their agency

IMPORTANT!

PLEASE NOTE THAT EACH INDIVIDUAL REGARDLESS OF HOUSEHOLD SIZE NEEDS TO APPLY FOR THEIR OWN INDIVIDUAL PASS. PASSES CANNOT BE SHARED WITHIN A HOUSEHOLD.

QUESTIONS/CONTACT INFORMATION

Email UPLIFT@osh.sccgov.org if the program coordinator at your agency changed.



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HMIS Newsletter

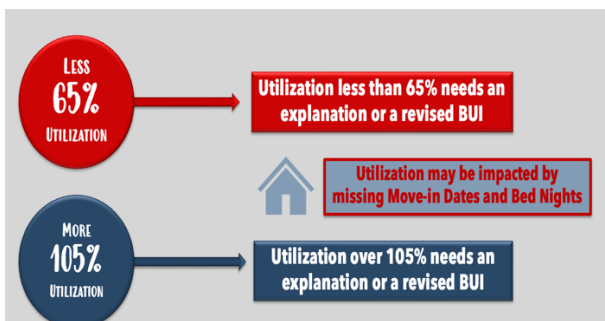


IN THE KNOW

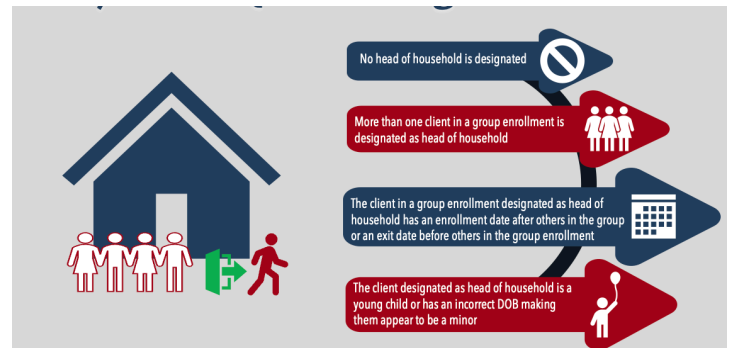
Federal Reporting HIC/PIT Data Quality Outreach

- 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

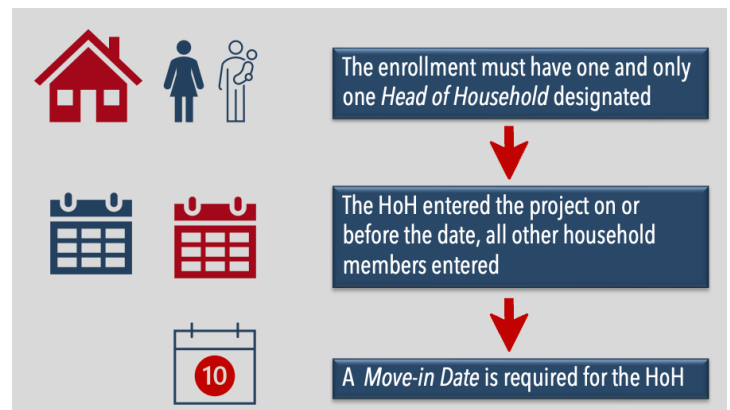
UTILIZATION



MISSING HoH



MOVE-IN-DATES



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



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ANNUAL CLIENT CONSENT TRAINING

- Each year HMIS users in Santa Clara County are required to retake and pass the Client Consent Training
- We anticipate the training releasing within the next few weeks, emails will go out with further details
- Please be sure and let your staff know this is forthcoming and is required!

NEW MANDATORY TRAINING ADDITION

- MyConnectSV Training
- All End Users who have not already completed the MyConnectSV training
- If you have access to the DA tab you can use the ["MyConnectSV Access Role Check"](#) to see if they need to do the training
- MyConnectSV is a secure site that connects providers and participants to simplify the housing process and empower those experiencing homelessness

HOW TO GUIDES

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Data Analysis Tab: MyConnectSV Training Tracker - How to Guide

Steps to run the report

- From Login - navigate to the Search page in HMIS
- Under your name: Make sure your agency appears - the agency that appears under your name is indicating which "Switch" agency you are in
- Click on the Report Library square in upper right corner of screen next to your name and message box, then click: **Reports**
- Once the new page has populated, you will see 3 tabs: Reports, Explore, and Data Analysis
- Navigate to the Data Analysis Tab
- Find **Santa Clara County HMIS Reports**, click the drop-down arrow next to the number of reports
- The Drop down will contain several buckets of reports, which are in bold - you can either scroll down to the Data Quality bucket - or use the web browser's search/find function and navigate to the report: **"MyConnectSV Access Role Check"**
- Click on **"Run"** next to the report named **"MyConnectSV Access Role Check"**
- In the top row of the report are the filters that can be adjusted
- Enter your agency name into the box labeled: **"Agency Filter."**
- Run the report to update the data to set filters *(it looks like an arrow going in a circle)*
- This will generate a list of all end users. Those with access role **"portal"** have completed the training.
- For data to reflect accurately on the report an End User who complete the training, should contact the Help Desk (scc-support@bitfocus.com) to get their access role changed

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MyConnectSV Report: How to Guide

Running the Report in the Data Analysis Tab

<p>A) Login into HMIS</p>	<p>H) Click on "Run" next to the report "MyConnectSV Access Role Check."</p>
<p>I) Ensure you are in the correct Agency (this is under your name/photo)</p>	<p>I) Enter your agency name into the box labeled: "Agency Filter"</p>
<p>C) From the Launchpad/Rubik's cube, select the REPORT module</p>	<p>J) Run the report by clicking the update button in the top right-hand</p>
<p>M) Once the new page has populated, you will see 3 tabs: Reports Library, Explore, and Data Analysis</p>	<p>K) This will generate a list of all end users. Those with access role "portal" have completed the training.</p>
<p>N) Navigate to the Data Analysis tab</p>	
<p>O) Select the Santa Clara County HMIS Reports, click the drop-down arrow</p>	
<p>G) You will see several reports listed; scroll down to the Data Quality section and select the "MyConnectSV Access Role Check"</p>	

CE ASSESSOR DEMOGRAPHIC SURVEY

This year, Santa Clara County is asking some questions about the background of its assessors.

This information will be made anonymous.

If you have any questions about this demographic survey, please contact the Homebase Team at SantaClaraCoC@homebaseccc.org

This survey is meant to help the Office of Supportive Housing, Bitfocus, and Homebase understand the demographics of Coordinated Entry assessors in Santa Clara County so we can observe the demographics of assessors match the demographics of the people being assessed in our community. **This data will not be shared with anyone outside of Homebase, the Office of Supportive Housing, or Bitfocus.**

If you conduct VISPDATs as part of your role, we ask that you please answer this short (3 question) survey. If you do not conduct Coordinated Entry Assessments as a part of your role, please feel free to skip this survey.

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ASSESSOR QUESTION #1

1. Please select all the language(s) in which you can conduct VI-SPDATs. (Select all that apply/ multi-select question).

A	English
B	Spanish
C	Vietnamese
D	Chinese
E	Other: _____

ASSESSOR QUESTION #2

2. What is your race/ ethnicity? (Select all that apply)

A	American Indian, Alaska Native, or Indigenous	F	Native Hawaiian or Pacific Islander
B	Asian or Asian American	G	White
C	Black, African American, or African	H	Client doesn't know
D	Hispanic/Latina/o	I	Client prefers not to answer
E	Middle Eastern or North African	J	Data not collected

ASSESSOR QUESTION #3

3. Your lived experiences are valuable for the people you serve. What lived experiences apply to you? (Select all that apply)

A	I have lived experience of being unhoused
B	I have experience with the criminal legal system
C	I am an immigrant
D	I am a survivor of violence
E	I have had challenges with my mental health or with substance use
F	Does not apply
G	I do not want to answer this question

SCC QUARTERLY COMPLIANCE CERTIFICATION CHECKLIST

Process

- Email reminder sent of upcoming deadline
- You will run report in DA Tab for list of End Users
- You will send list of certified End Users to Sys. Admin. Team per usual

- Certification Due
- *Thursday, April 30th*
 - Include all NEW HMIS users at your agency on [the standard form found here](#)
 - This means that your date range filter in the report on the DA tab will be 01/01/2026 – 03/31/2026
 - The report has been preset with this date range; so just select your agency name
 - Detailed steps on running the report can be found [here](#)

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

IMPORTANCE OF EMAIL ADDRESS IN HMIS

- The email address associated with an end-user profile in Clarity HMIS is crucial for security, communication, and operational efficiency. It enables automated password resets, sends alerts for client-related activities, and allows for two-factor authentication (2FA) to protect sensitive data.
- **Self-Service Password Resets:** If a user forgets their password, they can use the "Forgot Password?" link on the login page to initiate an automated email process to reset it. This allows users to regain access without waiting for a system administrator to manually reset it.
- **System Alerts and Notifications:** Clarity uses the email address to send notifications regarding new messages in the system inbox. This includes important alerts about pending community queue updates or housing referrals, ensuring staff act quickly on client



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needs.

- **Coordination of Care:** When a user is tagged in a client note, program note, or referral, they receive a notification via email, enabling immediate collaboration with other team members.
- When receiving notifications, users should never discuss client names, dates of birth, or Social Security Numbers via unencrypted email, as this can violate privacy regulations.
- **It is generally recommended to use a work email address for HMIS accounts to ensure security and accessibility.**

MEMOS

NEW HELP DESK TICKET PER ISSUE

PLEASE DO NOT REPLY TO OR REOPEN OLD TICKETS

Each request MUST be submitted as a new ticket so it can be properly tracked and assigned

We are continuing to see users replying to or reopening old tickets. To help us support you faster and more efficiently, please submit all new requests by sending a new email to sccsupport@bitfocus.com.

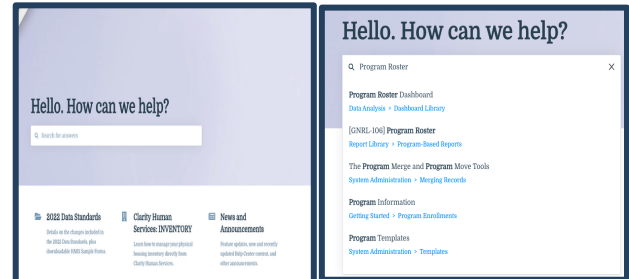
RECENTLY ASSESSED & NOT ON CHO

AGENCY NAME	AGENCY NAME	AGENCY NAME
LifeMoves 24	The United Effort Organization 4	County: SCVHHS - BHSD 1
HomeFirst 14	Bill Wilson Center 4	County: Reentry Resource Center 1
PATH 11	SVILC 3	San Jose State University Research Foundation (SJSU) 1
South County Community Services 8	Momentum for Health 2	Community Services Agency of Mountain View 1
County: SCVHHS - Ambulatory 7	Ujima Adult & Family Services 1	County: SSA - DEBS SSI Advocacy 1
Community Solutions 5	Telecare Corporation 1	City of San Jose 1
WeHOPE 5	Move Mountain View 1	

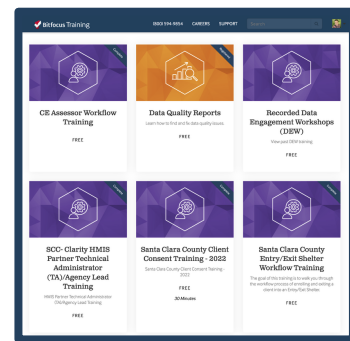
CE Assessment Referral Errors: How to Guide

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).

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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, May 7, 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

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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	Representative
Abode Services	Aida Tesfai
Abode Services	Luis Gonzalez
Abode Services	Will Hoffer
Amigos de Guadalupe	Aurora Olivares
Bible Way / Destiny	Aretha Cromwell
Bill Wilson Center	Randi Rosen
Bill Wilson Center	Sujata Panda
California Youth Outreach	Anthony Ortiz Jr.
California Youth Outreach	Julian Delgadillo
City of Morgan Hill	Brian Malicdem
City of San Jose	Marcell Leath
City of San Jose	Nathaniel Montgomery
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	Taylor David
County: SCVHHS - BHSD	Jeremy Golden
County: SSA - DEBS General Assistance	Angelica Garay
County: SSA - DEBS SSI Advocacy	Cassandra Brenzel
Destination: Home	Maureen Damrel

Downtown Streets Team	Maureen Damrel
Family Supportive Housing	Alex Le
Gardner Health Services	Jovani Quinones
Goodwill of Silicon Valley	Micheal Baca
HomeFirst	Crystal Ruiz
Institute on Aging	Christina Strine
JobTrain	Brodie Storey
LifeMoves	Carmen Kapanga
LifeMoves	Juan Hernandez
Mental Health Systems (MHS)	Cecilia Garate
Midtown Family Services	Stuart Richardson
Move Mountain View	Avir Kishan
Nation's Finest	Ilaisaane Fifita
Nation's Finest	Kim Decker
North East Medical Services (NEMS)	Candido Anicete
Pear Suite, Inc.	Kawehi Kea-Scott
Sacred Heart Community Service	Paulina Soto
Sacred Heart Community Service	Paulina Soto (deleted)
Social Impact Team (SIT) Property Owners Downtown Association	Chris Kendrix
South County Community Services	Jose Macias
South County Community Services	Myra Winthagen
Sunday Friends Foundation	Angel Garcia-Martinez
Sunnyvale Community Services	Catherine Farry
Teen Challenge	Milleka Wheeler
The United Effort Organization	Carolyn Stratton
WeHOPE	Anita Blount
WeHOPE	Crystal Ruiz