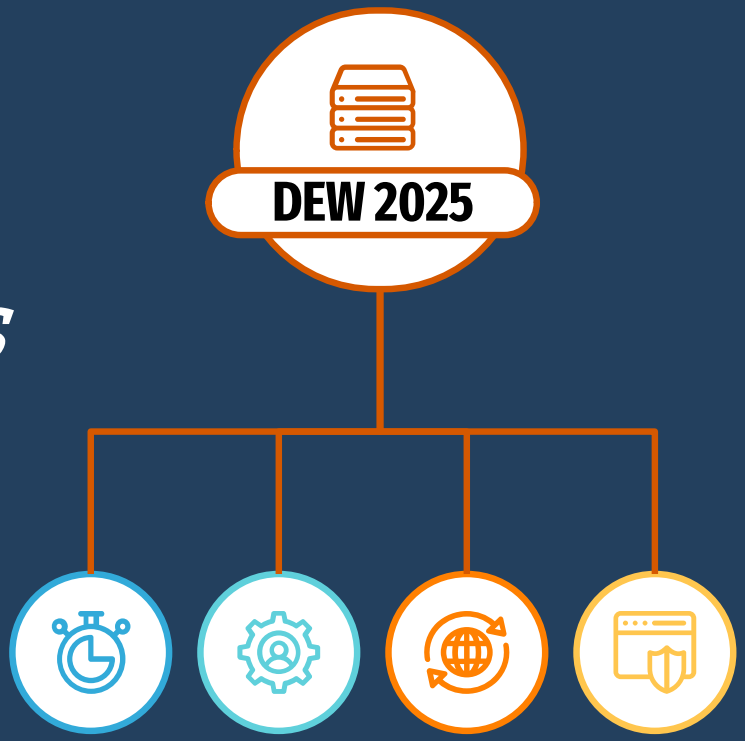
ROI's & Managing Household Members

Wednesday, August 27th, 2025

Time 1:00pm – 3:00pm



Introductions & Welcome!

Bryanna Corsbie

Lesly Soto Bright

*Ice Breaker – **Pineapple** on Pizza? Yay! Or Nay!*

Agenda Items

- INTROS
- ROI UPDATES
- HOUSEHOLD UPDATES
- PRACTICUM
- DE- BRIEF
- Q & A

ROI UPDATES

Updating Client Release of Information (ROI)

Where is the ROI

Where is the ROI housed in HMIS

How to add an ROI

Important pieces to keep in mind when uploading an ROI

Managing ROIs

What happens when the client has more than one ROI and/or needs an update

ROI and Anonymous Clients

What should I do if my client now wants to be anonymous?

Where is the ROI housed?

Mickey Milkovich

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

Bryanna Corsbie, System BC

SEARCH CASELOAD

CLIENT PROFILE

Social Security Number	*** - ** - ****
Quality of SSN	Client doesn't know
Last Name	Milkovich
First Name	Mickey
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	07/14/1994 Adult. Age: 31
Middle Name	Aleksander Suffix None
Alias	150289
Gender	Man (Boy, if child)
Race and Ethnicity	White
Additional Race and Ethnicity Detail	
Pronouns	Select
Veteran Status	No
Client is Deceased	

Connected

UNIQUE IDENTIFIER
B9D937AF6

SEND MESSAGE

Household Members Manage

No active members

Active Programs

[CE] County: OSH

Care Team 1 Manage

NT

How do I add an ROI?

Compliance Warning

Release of Information is Missing. Please review to ensure compliance.

MANAGE

Mickey Milkovich

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

PRIVACY

Client Privacy Public Private Client data is used by other agencies

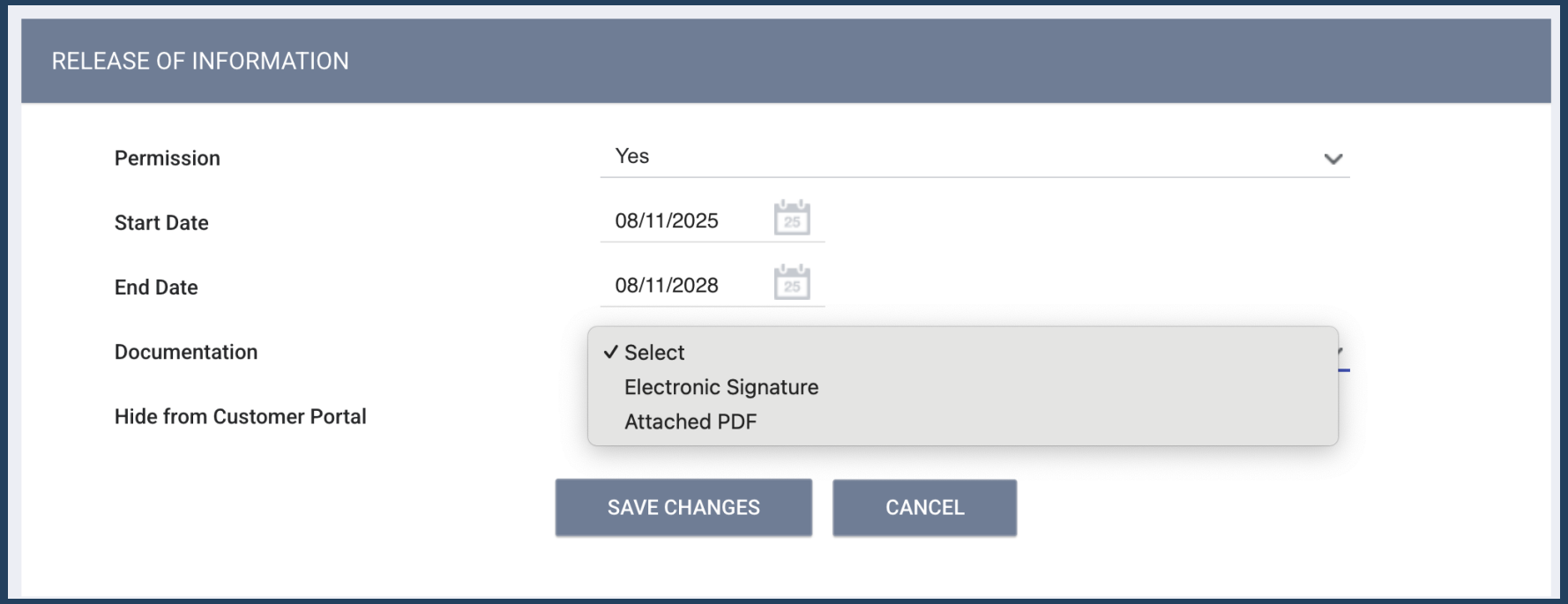
SAVE CHANGES CANCEL

RELEASE OF INFORMATION

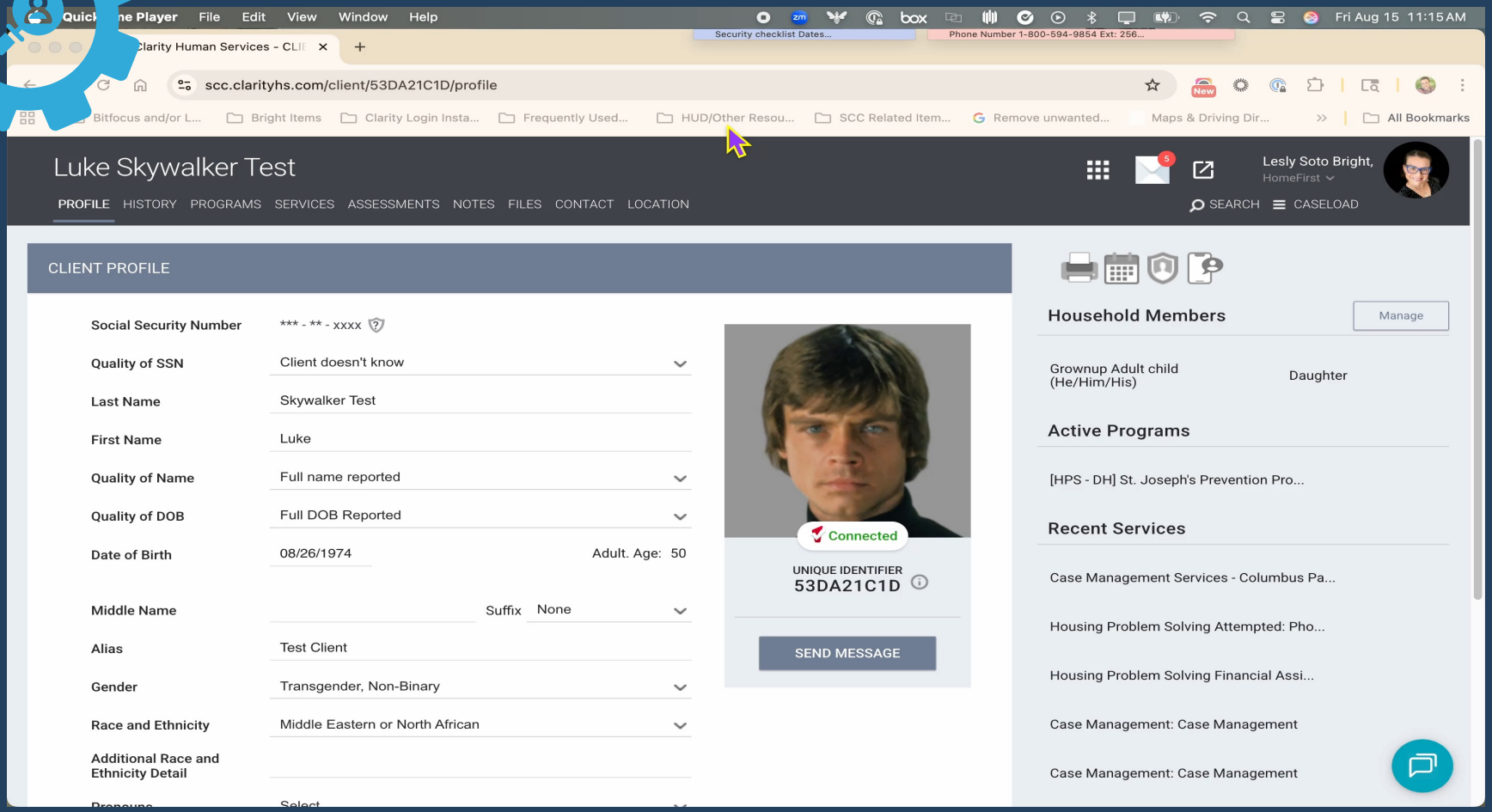
ADD RELEASE OF INFORMATION

Permission	Type	Start Date	End Date	Version
Yes HomeFirst CA-500	Attached PDF	01/01/2023	01/01/2026	V.5

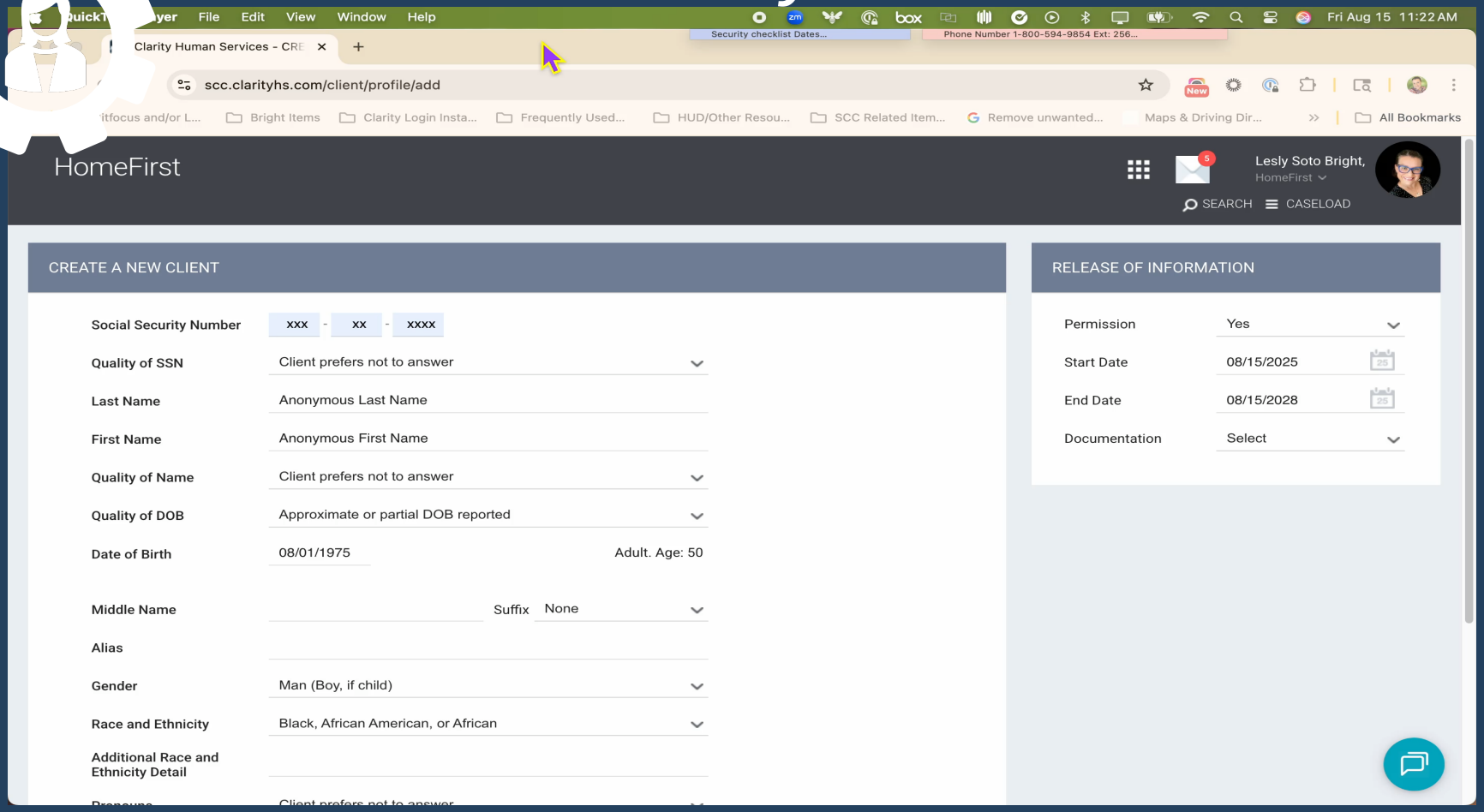
How do I add an ROI?



Managing ROI's



ROI's and Anonymous Clients



Anonymous Clients

ANONYMOUS CLIENT PROFILE

The following is a guide on how to create an anonymous client in HMIS when a client does not wish to have his or her information entered. *Anonymity does not prevent a client from accessing the benefits of Coordinated Assessment.*

**Please note making a client anonymous does make it more challenging for a client to effectively be located for housing referrals through Coordinated Assessment.*

Have Questions or Need Assistance please contact the HelpDesk or email accsupport@bitfocus.com

Need Assistance?

IF YOU WANT TO ANONYMIZE A PREEXISTING CLIENT PLEASE CONTACT THE HELP DESK FOR ASSISTANCE AT SCCSUPPORT@BITFOCUS.COM

Step 1

Prior to adding the information listed below, be sure to select *Permission NO* for Release of Information (ROI). Then enter information as directed.

Step 2

When entering the SSN please enter all xxx-xx-xxxx

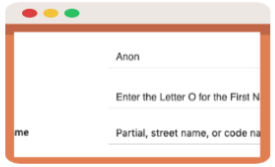
For the Quality of SSN select from the drop down option "Client Prefers Not to Answer"

Step 3

Please note you will need to enter a "Last Name" as a placeholder until the system gives you a Unique ID Number-you can use "Anon" and change to UID once you have the number

For the First Name enter the letter "O"

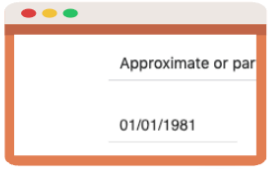
For Quality of Name select the Partial, street name, or code name reported



Step 4

For Quality of DOB select Approximate or Partial DOB Reported

Enter 01/01/xxxx for the Date of Birth-enter the year the client was born (e.g., 8/26/1981 *enter* 01/01/1981)



Step 5

Complete entering all of the demographic information for the "Anonymous" client and be sure to select ADD RECORD

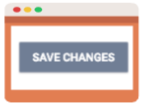
After you ADD RECORD, the UID will be provided (see number under profile image), be sure to take this number (copy & paste) and add it to the LAST NAME field changing "Anon" to the UID

Step 6

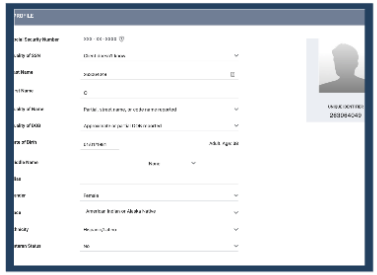
Please note this now becomes the clients last name in HMIS

Be sure to record this # for your paper records

Once you are done select SAVE CHANGES

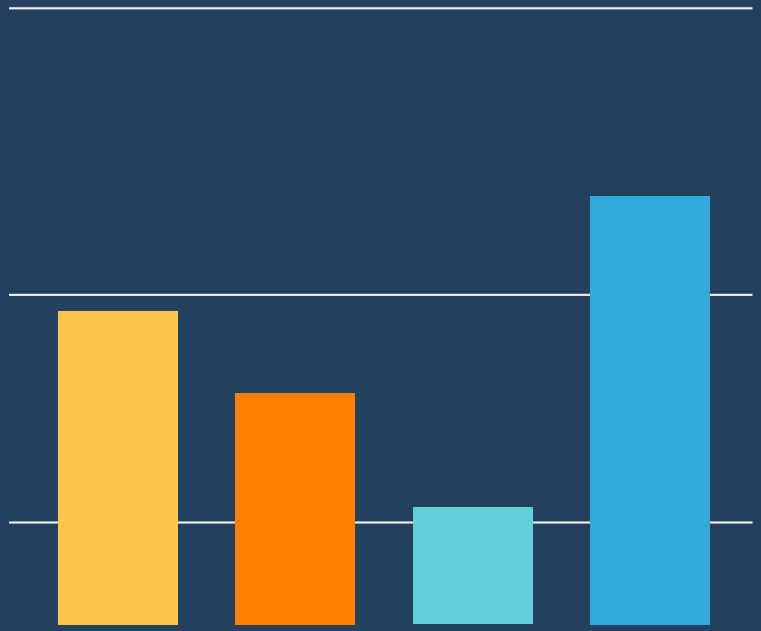


Once you have completed entering all demographic information and updating the Last Name-the client profile should look like this.



[SCC Bitfocus Forms & Manuals Page]

REPORTS



Helpful Reports – *Expiring Dashboards*

DATA ANALYSIS

Built In Reports	11 report(s)
Santa Clara County HMIS Reports	44 report(s)
Home	
Expiring ROI's Dashboard	RUN
Services and Case notes	RUN
CCP Reports	
CCP Clients with open enrollments missing annual assessment	RUN
CCP Data quality by user	RUN

Helpful Reports – *Expiring Dashboards*

Agency Management > [STFF-103] Staff Active Caseload

Project Type(s)

Coordinated Entry
Day Shelter
Homelessness Prevention
PH – Rapid Re-Housing
Encampment

Program Status

All Programs

Program(s)

Choose...
All
COVID-19 NCS Demo
Data Standards Screen Test
Data Standards Test - Melissa

Staff Status(es)

Choose...
All
Active
Inactive
Locked

Staff

Choose...
All
Abadajos, Regina
Admin, Admin
Anzaldo, Hannah

Report Output Format

Web Page PDF Excel CSV

Note: If the report contains more than 20,000 rows, the Report Output Format will be automatically changed to CSV
Note: * denotes Inactive Assigned Staff; ** denotes Deleted Assigned Staff

SUBMIT

Helpful Reports

Staff Active Caseload Report

[redacted]
Program(s): All
Staff Status(es): Active, Inactive, Locked
Staff: All

Assigned Staff: Last Name, First Name

Client Name	Unique ID	Birth Date	Relationship to HoH	Start Date	LoS	Assessments	Services	Case Notes
[redacted] - *Project Type: Coordinated Entry*								
[redacted]	B6B6AAD3D	01/01/1975	Self	07/17/2024	336	1	0	0
[redacted]	237D65840		Self	07/22/2024	331	1	0	0
[redacted]	16DD88320	01/01/2000	Self	07/22/2024	331	3	1	1
[redacted] - *Project Type: Other*								
[redacted]	16DD88320	01/01/2000	Self	12/11/2024	189	0	2	0
[redacted]	892B34FC4	01/01/1980	Self	05/30/2025	19	0	0	0
[redacted] *Project Type: PH – Permanent Supportive Housing (disability required for entry)*								
[redacted]	D74711EAE	10/28/1987	Self	04/01/2022	1,174	3	0	0

⚠ Release of Information is Missing. Please review to ensure compliance. MANAGE

HOUSEHOLD UPDATES

Updating Client Household

Creating Household Members

How do we create household members?

Exiting Household members

How to exit a household member from household

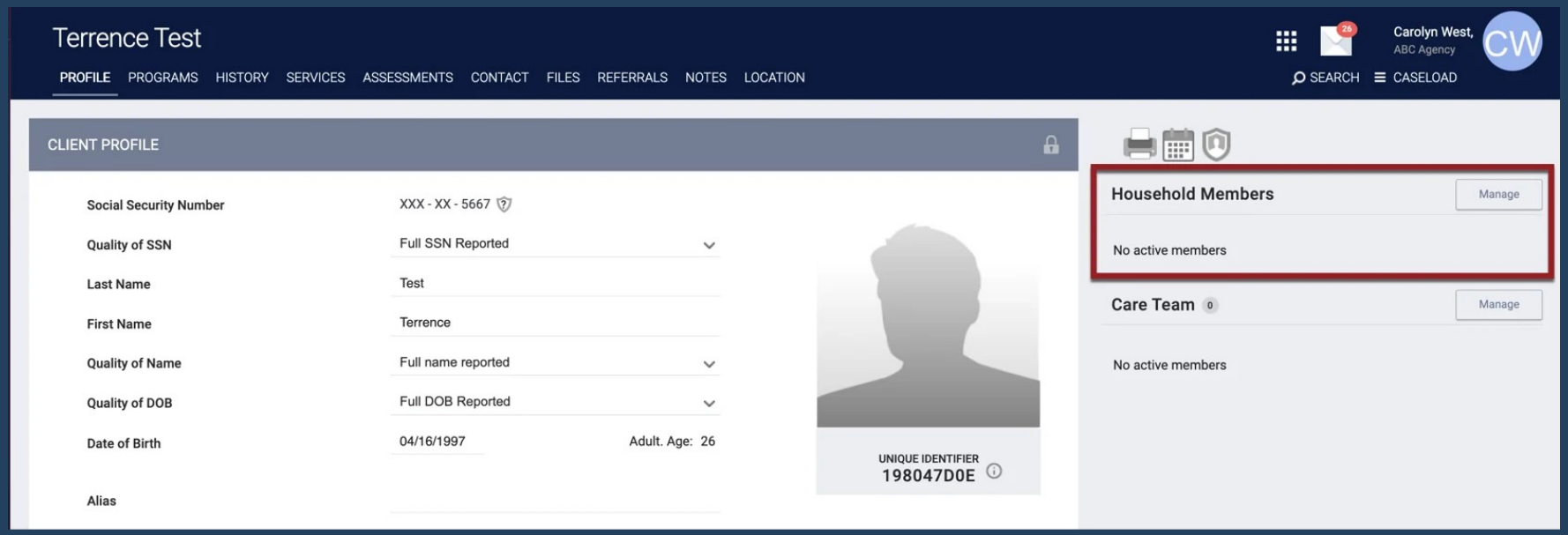
Adding Household Members - Enrollments

Adding a household member after enrollment to program

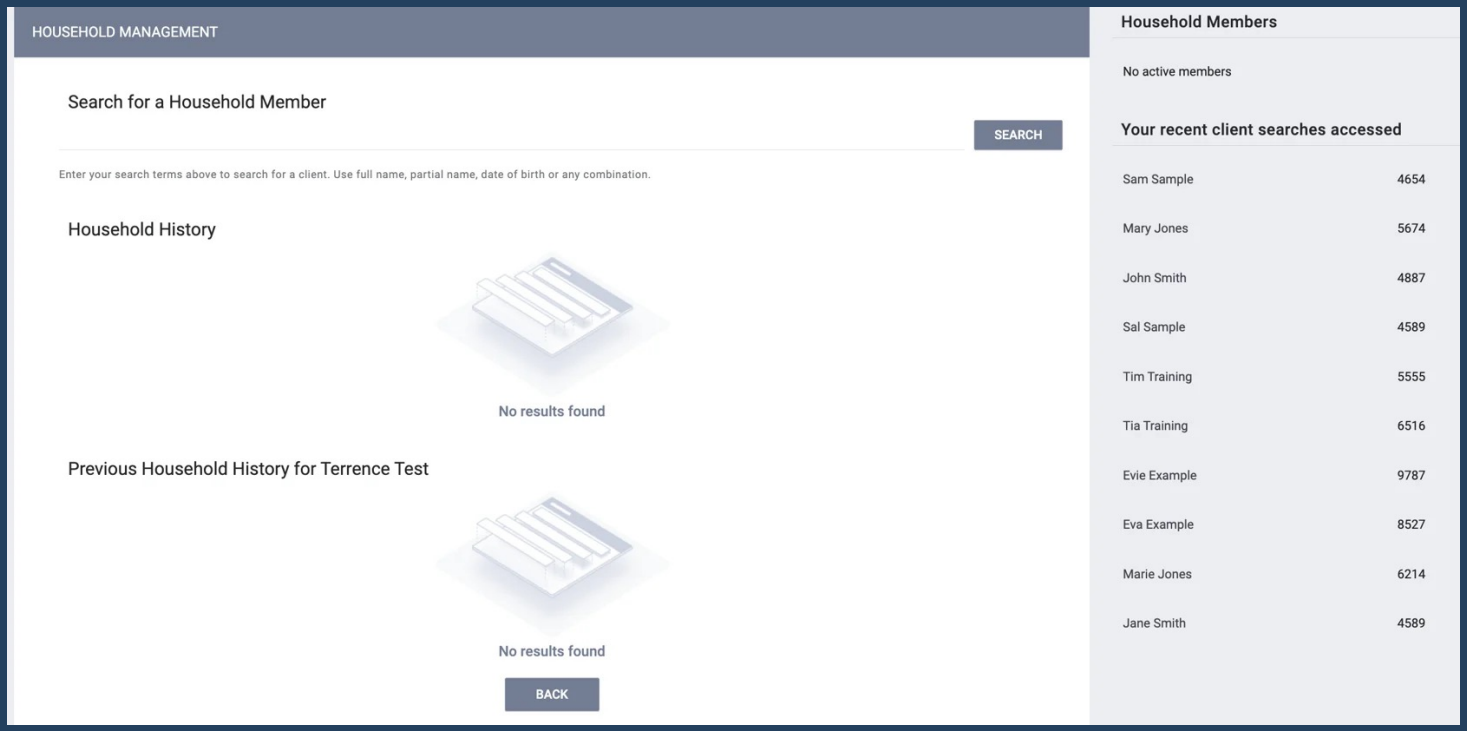
Shared Custody

How to set-up Household Members who have shared custody

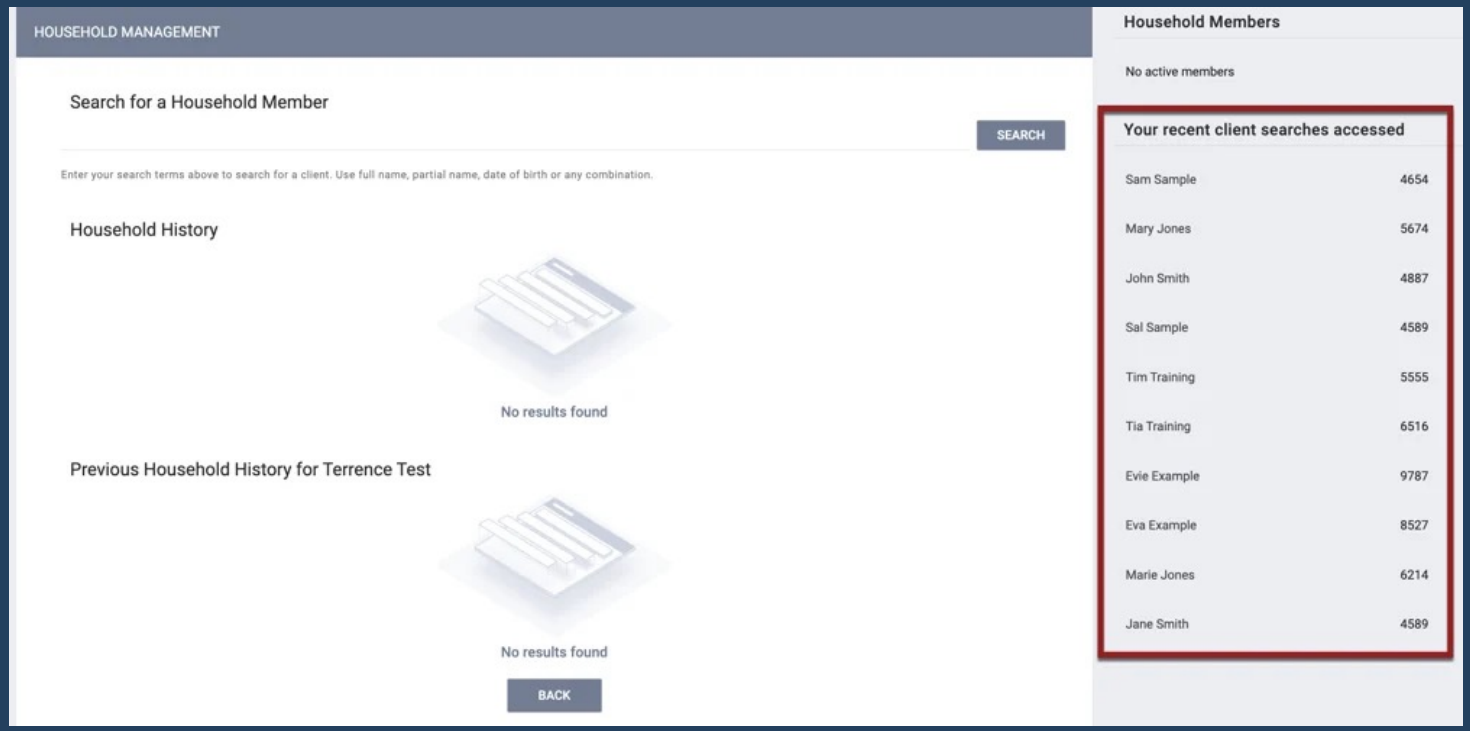
Creating Household Members



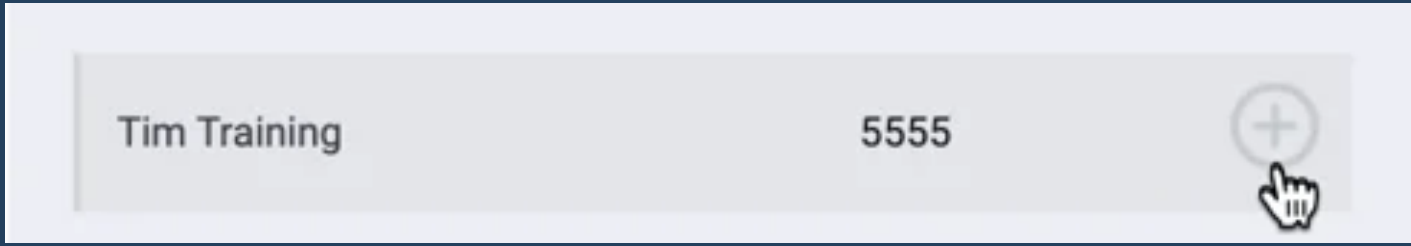
Creating Household Members



Creating Household Members

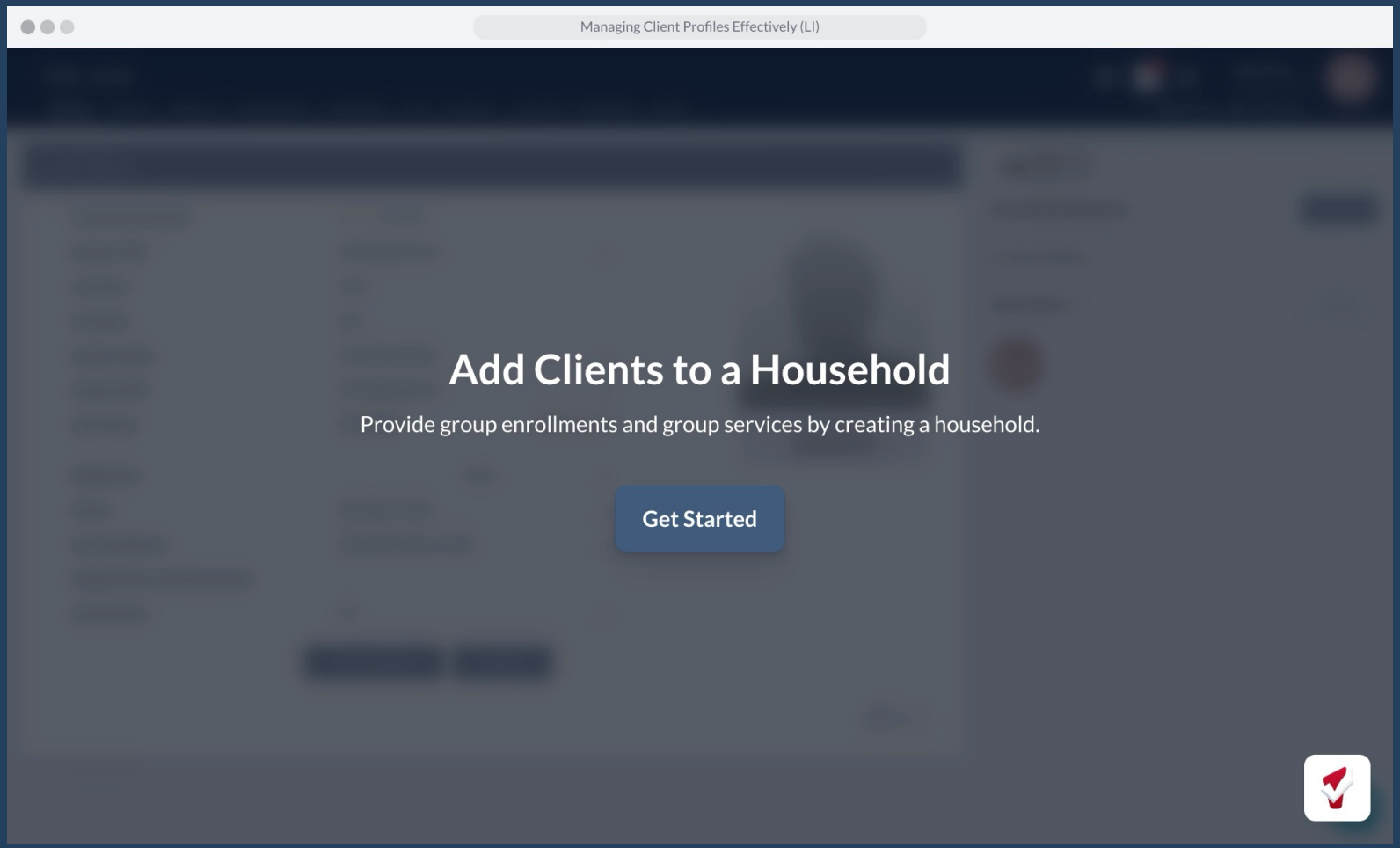


Creating Household Members



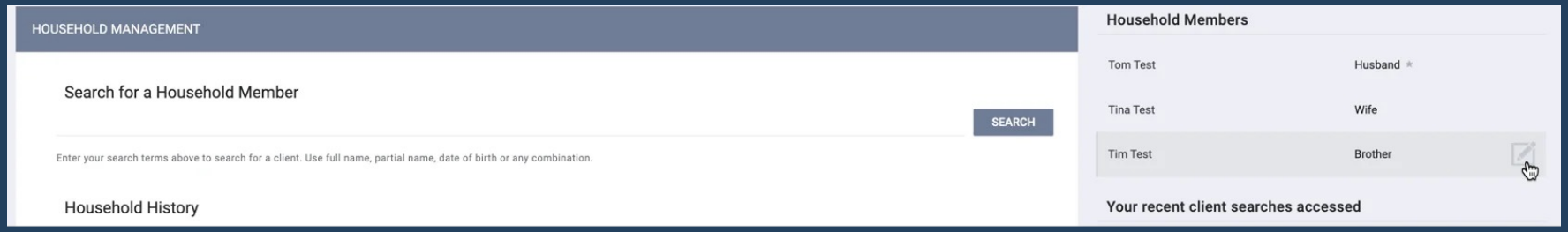
Creating Household Members

Video Demonstration

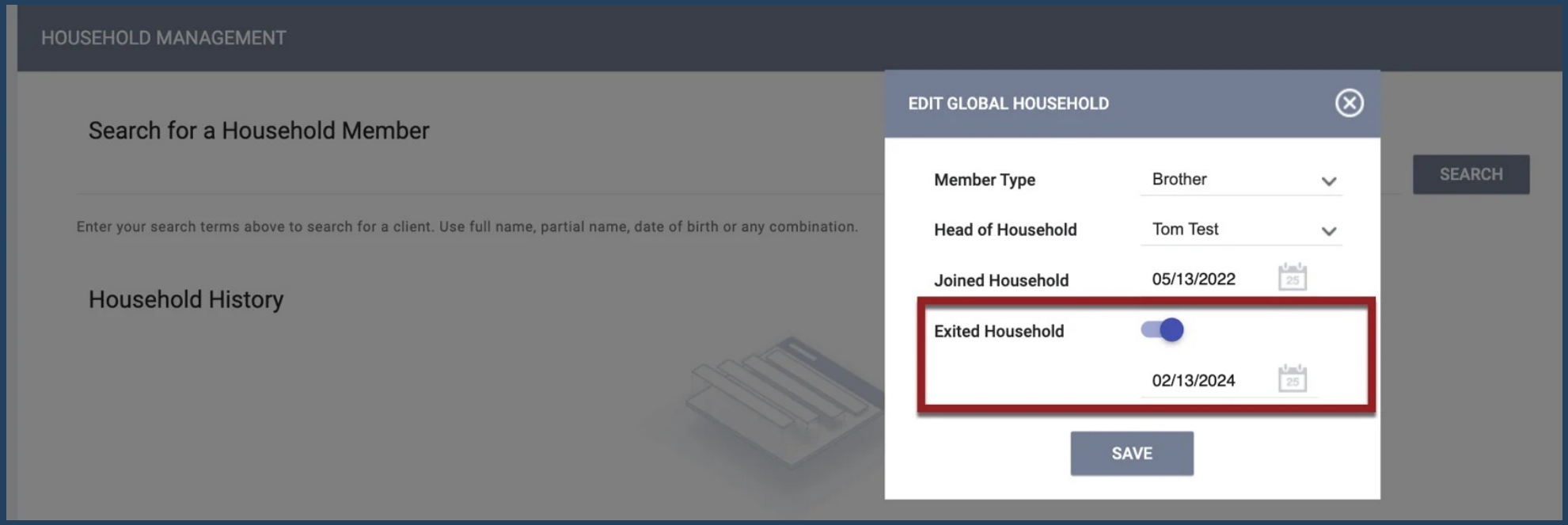


Exiting Household Members

If a Household member needs to **EXIT** from the group, click the *Edit* link beside any group member in the **Household Members** section.



Exiting Household Members



Exiting Household Members

The Exited date cannot be earlier than the Joined Household date

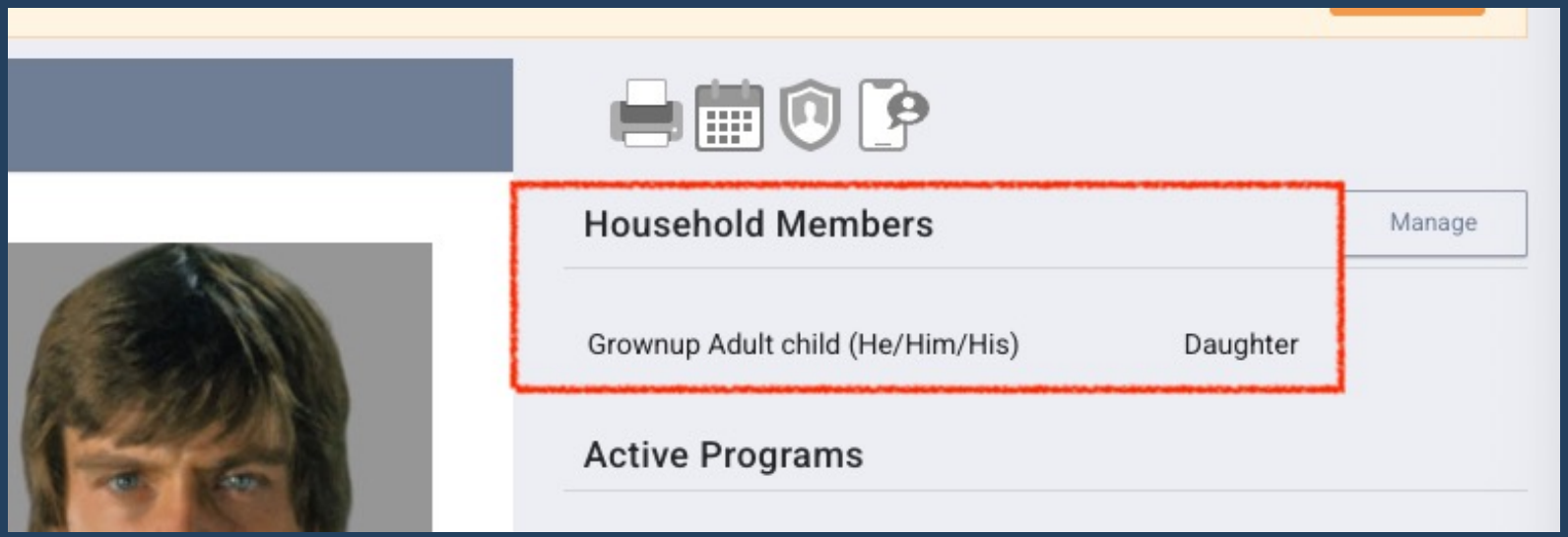
If the household member being exited is currently designated as Head of Household, you'll be prompted to assign a new Head Of Household before completing the task.

Adding Household Members - Enrollments

When enrolling a client into a program, you are prompted to select any household members who should be included in the enrollment.

However, if a client was not in the household at the time of enrollment, or if a staff member did not select the household member for inclusion, you may need to add the client to the enrollment later.

Adding Household Members - Enrollments

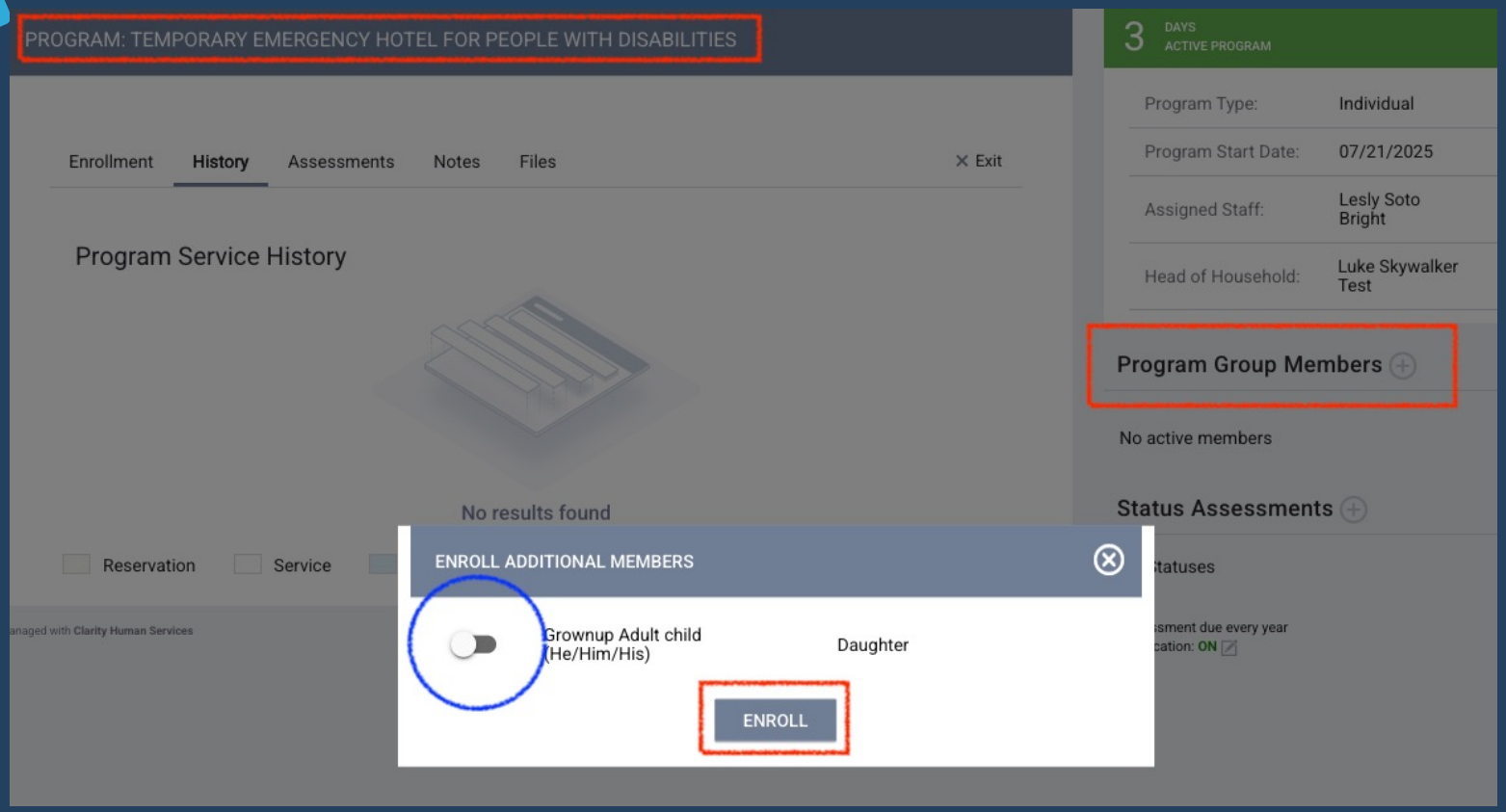


Adding Household Members - Enrollments

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Temporary Emergency Hotel for People with Disabilities Emergency Shelter – Entry Exit Silicon Valley Independent Living Center (SVILC)	07/21/2025	Active	Individual

Adding Household Members - Enrollments



Adding Household Members - Enrollments

Enroll 'Temporary Emergency Hotel for People with Disabilities' program for

Program Date 07/24/2025

Relationship to Head of Household Select

Zip Code of Last Address

DISABLING CONDITIONS AND BARRIERS

Disabling Condition Select

Physical Disability Select

Developmental Disability Select

Chronic Health Condition Select

HIV - AIDS Select

Mental Health Disorder Select

Substance Use Disorder Select

HEALTH INSURANCE

Covered by Health Insurance Select

SAVE & CLOSE CANCEL

Shared Custody

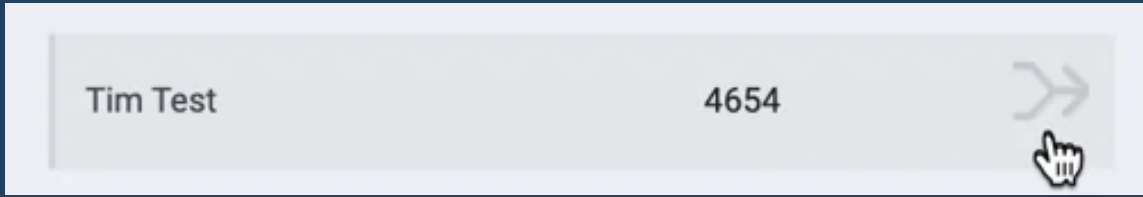
If two assisted families have joint custody of the same child/children, then how can these children be tracked in HMIS under a household?

Shared Custody

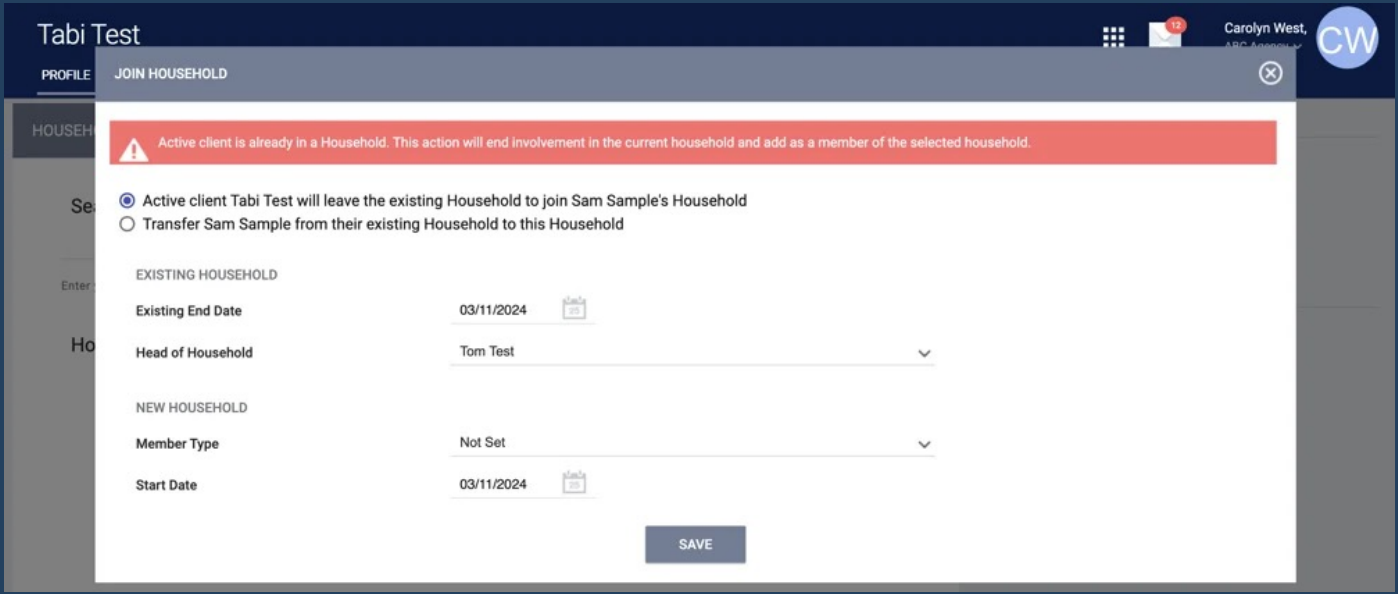
- A client cannot be a **member of 2 distinct Households** at the same time
- A determination needs to be made as to which household member can claim the dependent and add them to their household
- If the child goes back and forth between parents, the child needs to be enrolled and exited each time when they are with the other parent

Effective Household Management Checklist

A client with a "Join" icon is already a member of a different Household

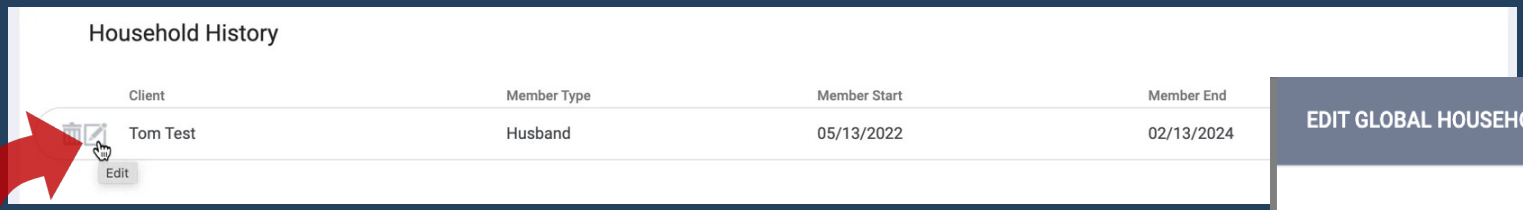


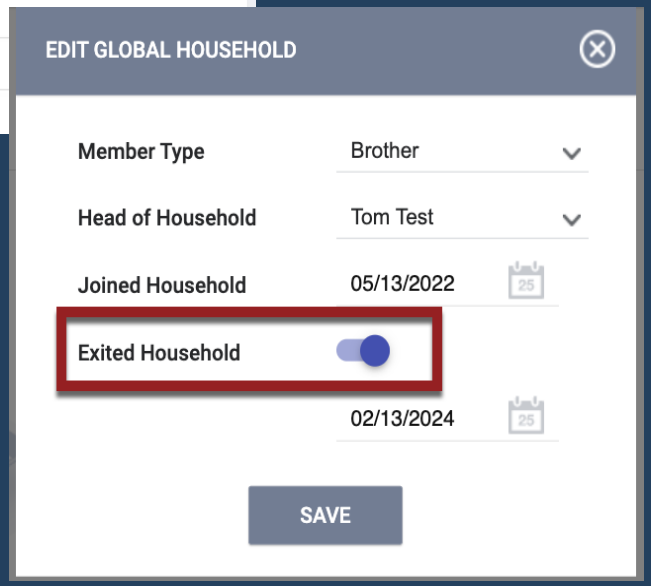
The client selected to join other household is the designated HoH for the program enrollment they are leaving



Effective Household Management Checklist

If a client is accidentally exited from a household and needs to be “reactivated” into it, you can "reactivate" them in the household if needed

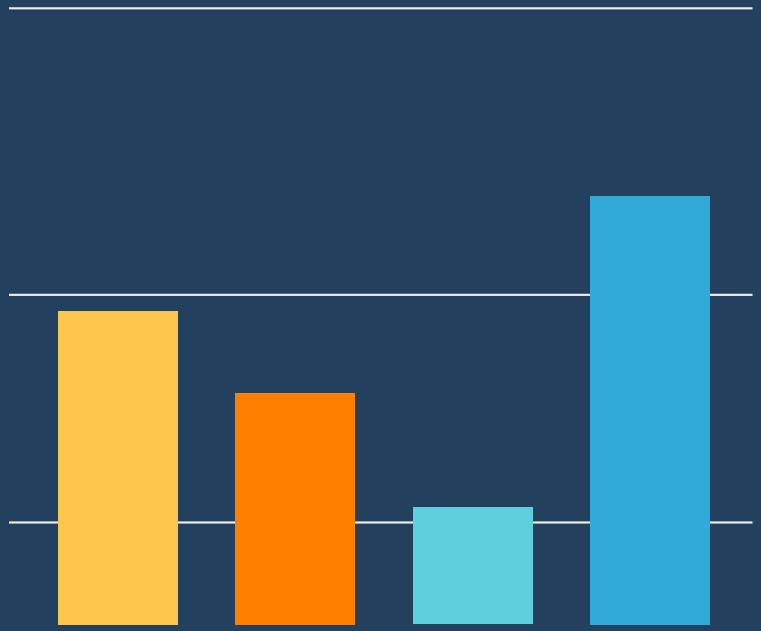




The Household History section lists clients who were previously in this household but are no longer in it

The Previous Household History section lists clients who were previously in a household with this client

REPORTS



Helpful Reports & Resources

[GNRL-240] Program Household Served

This program-based report provides a summary of households served, during the reporting period, and the size of the enrolled households.

Households Served Report

Agency Name
Veteran Status: All
Date Range: 05/01/2020 thru 04/30/2021

Program Name		
Total Clients Served:		145
Total Households Served:		48
Household Size	**# Of Households**	**# Of Persons in HH**
1 person HH	1	1
2 person HH	20	40
3 person HH	18	54
4 person HH	2	8
5 person HH	4	20
6 person HH	0	0
7+ person HH	3	22

Total Clients Served:		182
Total Households Served:		54
Household Size	**# Of Households**	**# Of Persons in HH**
1 person HH	2	2
2 person HH	20	40
3 person HH	14	42
4 person HH	7	28
5 person HH	5	25
6 person HH	3	18
7+ person HH	3	27

Helpful Reports

[HUDX-225] HMIS Data Quality Report
Q3 Universal Data Elements

This report reviews data quality across several HMIS Data Elements – Q3 is what we want for Household Information

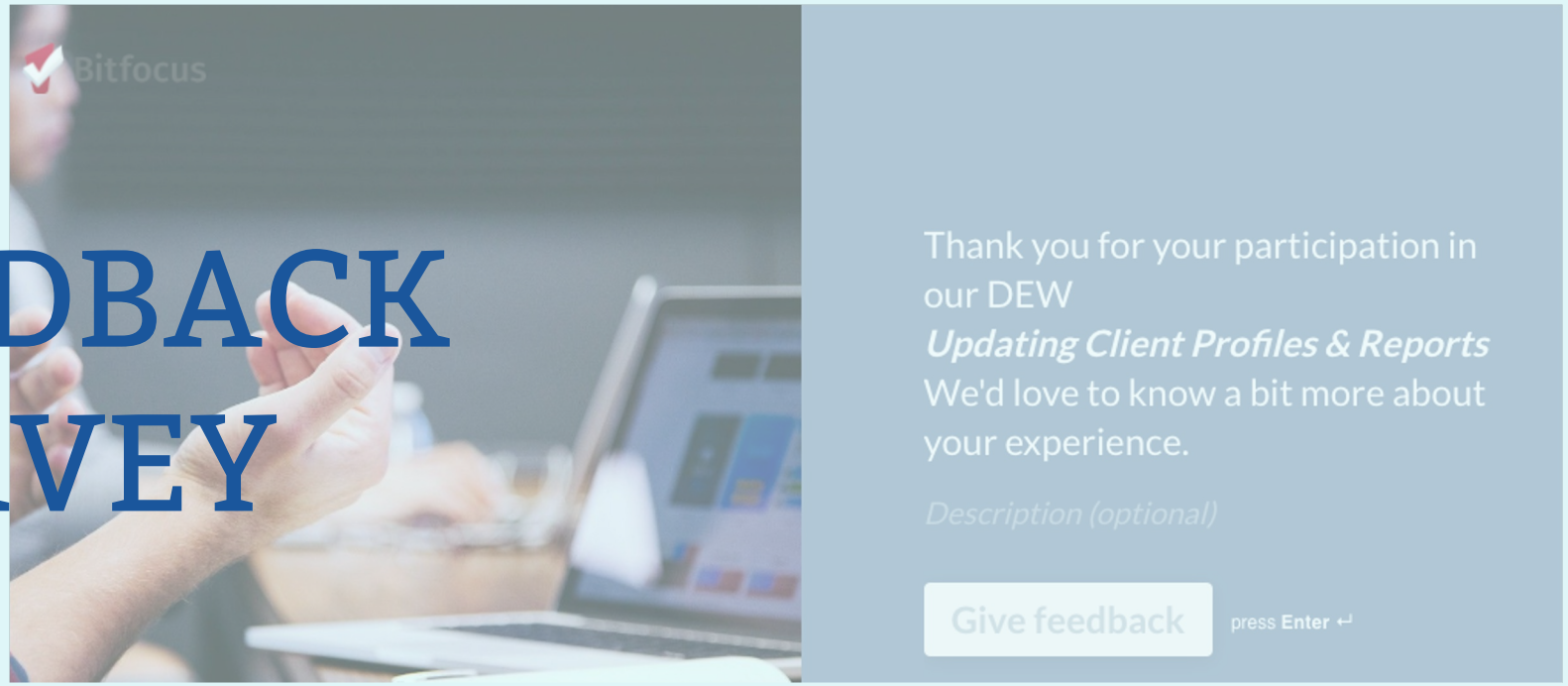
Q3. Universal Data Elements

Program Applicability: All Projects

Data Element	Client Doesn't Know/Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Veteran Status (3.07)	9	22	0	31	6.21%
Project Start Date (3.10)			85	85	16.70%
Relationship to Head of Household (3.15)		5	318	323	63.46%
Enrollment CoC (3.16)		32	9	41	32.28%
Disabling Condition (3.08)	3	86	26	115	22.59%

PRACTICUM

DE-BRIEF

Q & A

FEEDBACK SURVEY