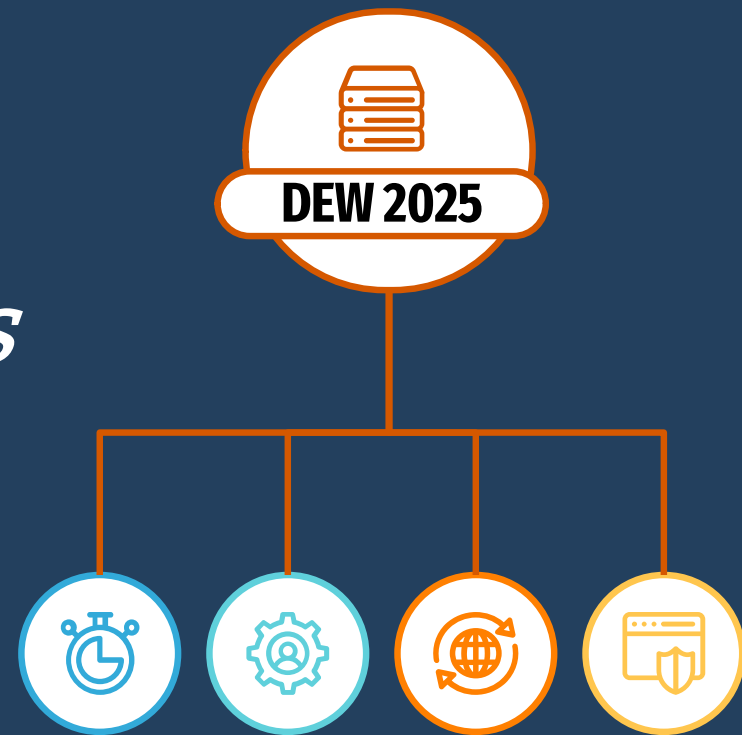


ROI's & Managing Household Members

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 SSNClient doesn't know

Last NameMilkovich

First NameMickey

Quality of NameFull name reported

Quality of DOBFull DOB Reported

Date of Birth07/14/1994Adult Age: 31

Middle NameAleksanderSuffix None

Alias150289

GenderMan (Boy, if child)

Race and EthnicityWhite

Additional Race and Ethnicity Detail

PronounsSelect

Veteran StatusNo

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?

RELEASE OF INFORMATION

Permission

Yes



Start Date

08/11/2025



End Date

08/11/2028



Documentation

✓ Select

Electronic Signature

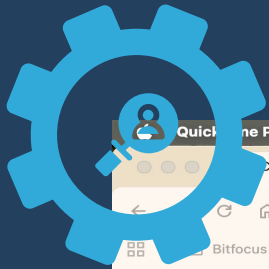
Attached PDF

Hide from Customer Portal

SAVE CHANGES

CANCEL





Managing ROI's

QuickTime Player File Edit View Window Help

Clarity Human Services - CL... x +

Security checklist Dates... Phone Number 1-800-594-9854 Ext: 256...

scc.clarityhs.com/client/53DA21C1D/profile

Bitfocus and/or L... Bright Items Clarity Login Insta... Frequently Used... HUD/Other Resou... SCC Related Item... Remove unwanted... Maps & Driving Dir... All Bookmarks

Luke Skywalker Test


PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

SEARCH CASELOAD

Lesly Soto Bright, HomeFirst

CLIENT PROFILE

Social Security Number	*** - ** - xxxx	
Quality of SSN	Client doesn't know	
Last Name	Skywalker Test	
First Name	Luke	
Quality of Name	Full name reported	
Quality of DOB	Full DOB Reported	
Date of Birth	08/26/1974	Adult. Age: 50
Middle Name		Suffix None
Alias	Test Client	
Gender	Transgender, Non-Binary	
Race and Ethnicity	Middle Eastern or North African	
Additional Race and Ethnicity Detail		
Presumptive	Select	



Connected

UNIQUE IDENTIFIER
53DA21C1D

SEND MESSAGE

Household Members

Manage

Grownup Adult child (He/Him/His) Daughter

Active Programs

[HPS - DH] St. Joseph's Prevention Pro...

Recent Services

Case Management Services - Columbus Pa...

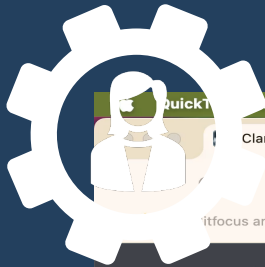
Housing Problem Solving Attempted: Pho...

Housing Problem Solving Financial Assi...

Case Management: Case Management

Case Management: Case Management





ROI's and Anonymous Clients

QuickT...yer File Edit View Window Help

Security checklist Dates... Phone Number 1-800-594-9854 Ext: 256...

Clarity Human Services - CRE x +

scc.clarityhs.com/client/profile/add

itfocus and/or L... Bright Items Clarity Login Insta... Frequently Used... HUD/Other Resou... SCC Related Item... Remove unwanted... Maps & Driving Dir... All Bookmarks

HomeFirst

Lesly Soto Bright, HomeFirst

SEARCH CASELOAD

CREATE A NEW CLIENT

Social Security Number	xxx - xx - xxxx
Quality of SSN	Client prefers not to answer
Last Name	Anonymous Last Name
First Name	Anonymous First Name
Quality of Name	Client prefers not to answer
Quality of DOB	Approximate or partial DOB reported
Date of Birth	08/01/1975 Adult Age: 50
Middle Name	Suffix None
Alias	
Gender	Man (Boy, if child)
Race and Ethnicity	Black, African American, or African
Additional Race and Ethnicity Detail	
Pronouns	Client prefers not to answer

RELEASE OF INFORMATION

Permission	Yes
Start Date	08/15/2025
End Date	08/15/2028
Documentation	Select





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 anonapp@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 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 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 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**

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

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

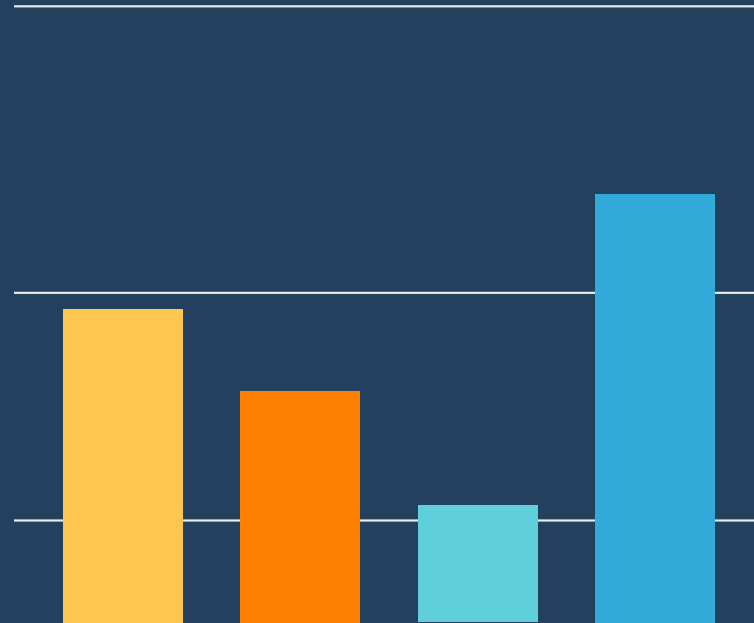
Step 4

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]

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



HOUSEHOLD UPDATES

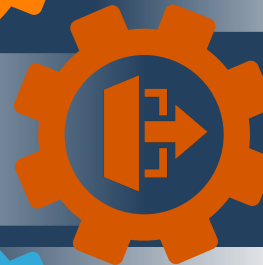


Updating Client Household



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

Terrence Test

PROFILE PROGRAMS HISTORY SERVICES ASSESSMENTS CONTACT FILES REFERRALS NOTES LOCATION

Carolyn West, ABC Agency CW

SEARCH CASELOAD

CLIENT PROFILE

Social Security NumberXXX - XX - 5667

Quality of SSNFull SSN Reported

Last NameTest

First NameTerrence

Quality of NameFull name reported

Quality of DOBFull DOB Reported

Date of Birth04/16/1997Adult Age: 26

Alias

UNIQUE IDENTIFIER
198047D0E

Household Members

No active members

Care Team

No active members





Creating Household Members

HOUSEHOLD MANAGEMENT

Search for a Household Member

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Household History

No results found

Previous Household History for Terrence Test

No results found

BACK

Household Members

No active members

Your recent client searches accessed

Sam Sample	4654
Mary Jones	5674
John Smith	4887
Sal Sample	4589
Tim Training	5555
Tia Training	6516
Evie Example	9787
Eva Example	8527
Marie Jones	6214
Jane Smith	4589





Creating Household Members

HOUSEHOLD MANAGEMENT

Search for a Household Member

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Household History

No results found

Previous Household History for Terrence Test

No results found

BACK

Household Members

No active members

Your recent client searches accessed

Sam Sample	4654
Mary Jones	5674
John Smith	4887
Sal Sample	4589
Tim Training	5555
Tia Training	6516
Evie Example	9787
Eva Example	8527
Marie Jones	6214
Jane Smith	4589





Creating Household Members

Tim Training

5555





Creating Household Members

ADD TO HOUSEHOLD

Member Type

Brother

▼

Start Date

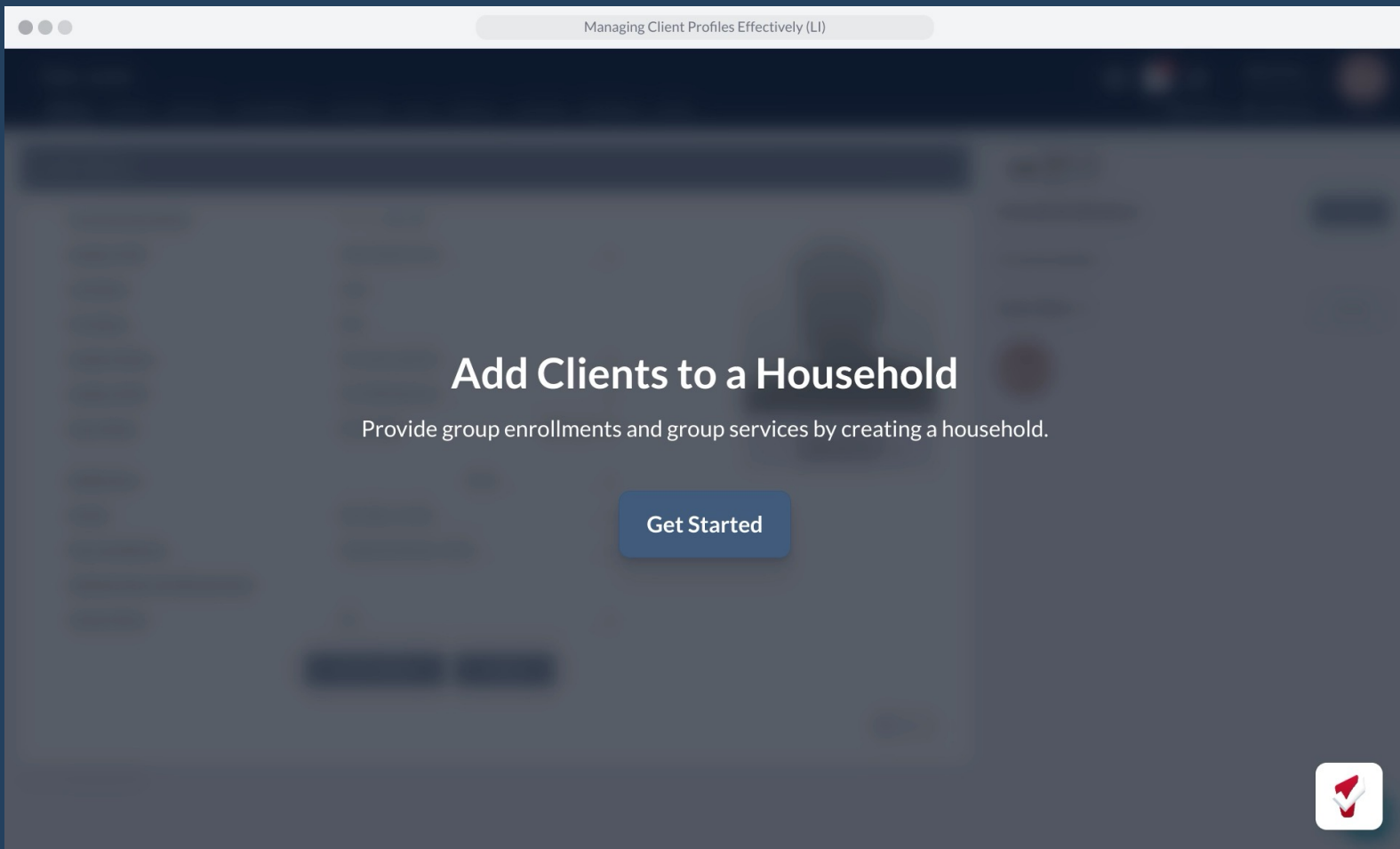
02/14/2024

25

SAVE



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.

HOUSEHOLD MANAGEMENT


Search for a Household Member

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Household History

Household Members

Tom Test	Husband *	
Tina Test	Wife	
Tim Test	Brother	

Your recent client searches accessed





Exiting Household Members

HOUSEHOLD MANAGEMENT

Search for a Household Member

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Household History

EDIT GLOBAL HOUSEHOLD



Member Type Brother



Head of Household Tom Test



Joined Household 05/13/2022



Exited Household ☒

02/13/2024



SAVE

SEARCH





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

Household Members

Grownup Adult child (He/Him/His)	Daughter
----------------------------------	----------

Active Programs

Manage





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

PROGRAM: TEMPORARY EMERGENCY HOTEL FOR PEOPLE WITH DISABILITIES

Enrollment **History** Assessments Notes Files × Exit

Program Service History

No results found

☐ Reservation ☐ Service

Managed with Clarity Human Services

3 DAYS ACTIVE PROGRAM

Program Type: Individual

Program Start Date: 07/21/2025

Assigned Staff: Lesly Soto Bright

Head of Household: Luke Skywalker Test

Program Group Members +

No active members

Status Assessments +

statuses

ment due every year

cation: ON ☒

ENROLL ADDITIONAL MEMBERS ×

☒ Grownup Adult child (He/Him/His) Daughter


ENROLL





Adding Household Members - Enrollments


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


Program Date 


Relationship to Head of Household


Zip Code of Last Address


DISABLING CONDITIONS AND BARRIERS


Disabling Condition 


Physical Disability 

Developmental Disability 

Chronic Health Condition 

HIV - AIDS 

Mental Health Disorder 

Substance Use Disorder 

HEALTH INSURANCE

Covered by Health Insurance





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

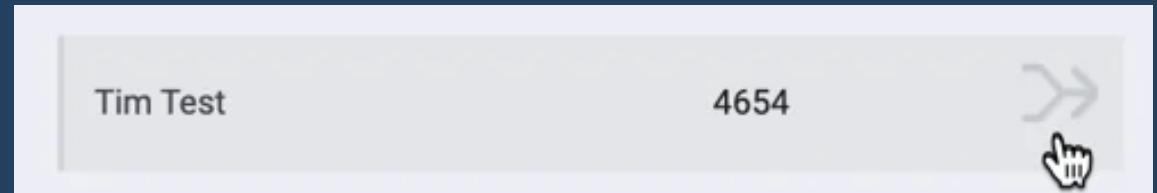


If the child goes back and forth between parents, the child needs to be enrolled and exited each time when they are with the other parent



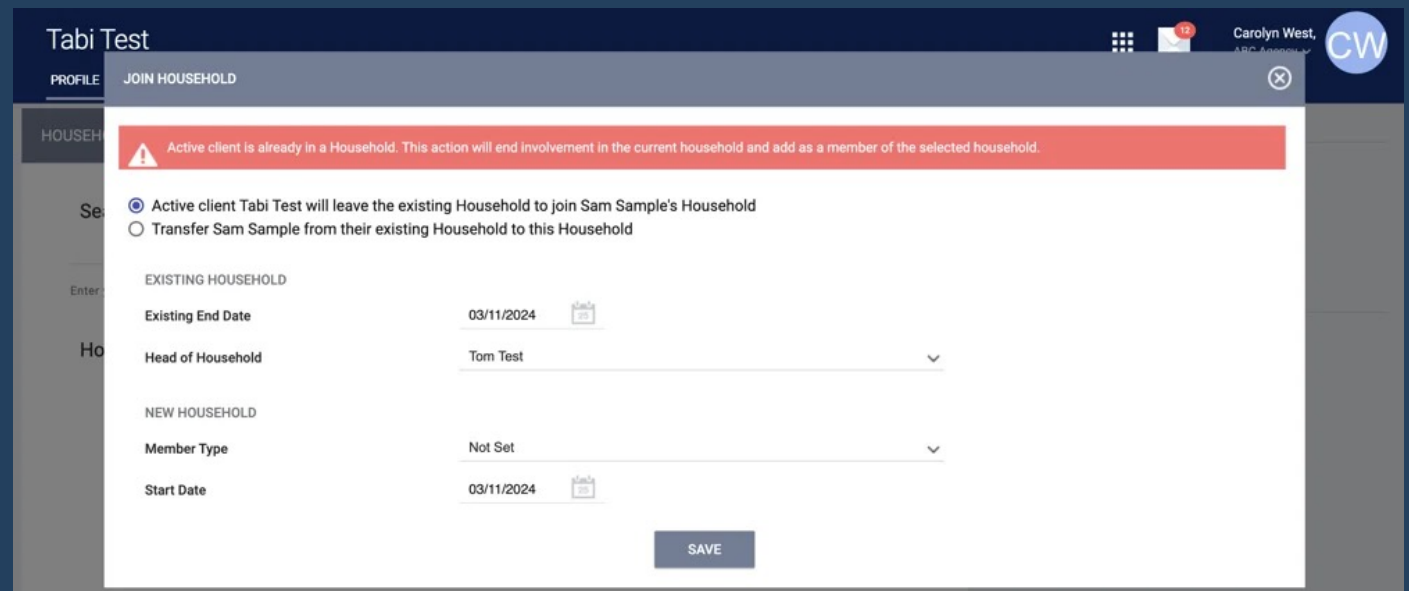
✓ Effective Household Management Checklist

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



Tim Test 4654

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



Tabi Test

PROFILE JOIN HOUSEHOLD

Active client is already in a Household. This action will end involvement in the current household and add as a member of the selected household.

☒ Active client Tabi Test will leave the existing Household to join Sam Sample's Household

☐ Transfer Sam Sample from their existing Household to this Household

EXISTING HOUSEHOLD

Existing End Date 03/11/2024

Head of Household Tom Test

NEW HOUSEHOLD

Member Type Not Set


Start Date 03/11/2024

SAVE



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

Household History			
Client	Member Type	Member Start	Member End
Tom Test	Husband	05/13/2022	02/13/2024
 Edit			



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

EDIT GLOBAL HOUSEHOLD

Member Type

Brother

Head of Household

Tom Test

Joined Household

05/13/2022

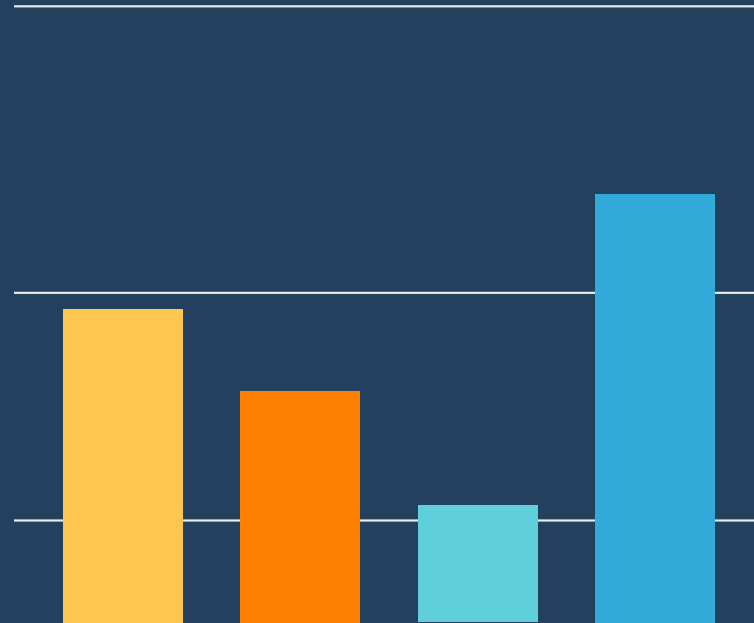
Exited Household

☒

02/13/2024

SAVE

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/Prefer 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



Thank you for your participation in
our DEW
Updating Client Profiles & Reports
We'd love to know a bit more about
your experience.

Description (optional)

Give feedback

press Enter ↵

