



# System Overview: Tips and Tools for Navigating HMIS May 7, 2024



# Today's Training Team



Angie Evans  
Bitfocus



Lesly Soto Bright  
Bitfocus



Leila Qureishi  
County: OSH



Marcell Leath  
San Jose



Nate Montgomery  
San Jose

# Overview - What Today's Training Will Cover

10:00am – 10:15am: Introductions (Lesly)

10:15am – 10:25am: Clarity System Overview (Angie)

10:25am – 10:40am: Managing the Client Record (Lesly)

10:40am – 10:55am: Reporting (Angie)

10:55am – 11:00am: Zoom Room Assignments

11:00am – 11:30am: Scenarios/Practicum

11:30am – 12:00pm: Debrief





# Clarity System: Overview



# Clarity System: Overview



## Login To HMIS

Login to the Santa Clara County  
Clarity Human Services HMIS here.



# Case Management

Luke Skywalker Test

PROFILEHISTORYPROGRAMSSERVICESASSESSMENTSNOTESFILESCONTACTLOCATION

1

57

Angie Evans,  
HomeFirst

AE

SEARCHCASELOAD

PROGRAM: SER CSJ - STREET OUTREACH

EnrollmentHistoryProvide ServicesAssessmentsNotesFilesExit

Services

Behavioral Health ConnectionHealth Care

Housing Problem Solving AttemptedCase Management

OutreachNo Category

RRH (SER/RRH CSJ)Case Management

Clinical Services

Housing inspection

Housing Search

Mobile Case management

39 DAYS  
ACTIVE PROGRAM

Program Type:Group (2)

Program Start Date:03/22/2024

Assigned Staff:Lesly Soto Bright

Head of Household:Luke Skywalker Test

Program Group Members

Clara Test  
(She/Her/Hers)

03/28/2024

Active

Status Assessments

04/09/2024

STATUS

Assessment due every year  
Notification: ON

Chat Widge

# Resource Directory

HomeFirst

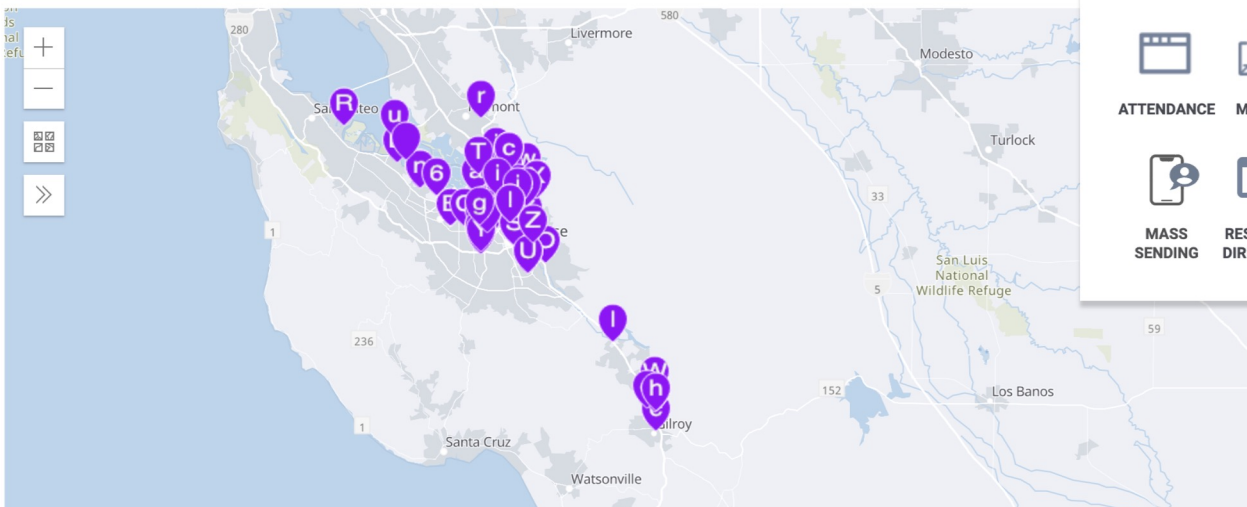
1

RESOURCE DIRECTORY

+

-

>>



Agency 

Select

 Program 

Select

 Category 

Select

 City 

Select

 Status 

All

SEARCH

SETUP

MANAGE

REPORTS

CALENDAR

ATTENDANCE

MERGE

DATA IMPORT

INVENTORY

MASS SENDING

RESOURCE DIRECTORY

# Attendance Services

Help Center Agency

38

Zoey Keeper,  
Help Center Agency

SEARCHCASELOAD

FOOD FOR THE KINGDOM : SACK LUNCH

Date05/18/201828

Friday, May 18th, 2018

ManualScanned

In Attendance

Client Name	Last 4 SSN	
Lion, Mufasa	4589	
Lion, Scar	1111	

Clients from last 4 Months

Client Name	Last 4 SSN
-------------	------------

Client Search

SEARCH

Clients Name	Date of Birth	Last SSN	
Gaglione, Michael	04/07/1996	9-13	Add
Lion, Mufasa (Alias: Mufasa)	12/12/1967	4589	Added
Lion, Sarabi	04/01/1994	2545	Add
Lion, Sarafina	12/25/1994	1345	Add
Lion, Scar	09/08/1978	1111	Added

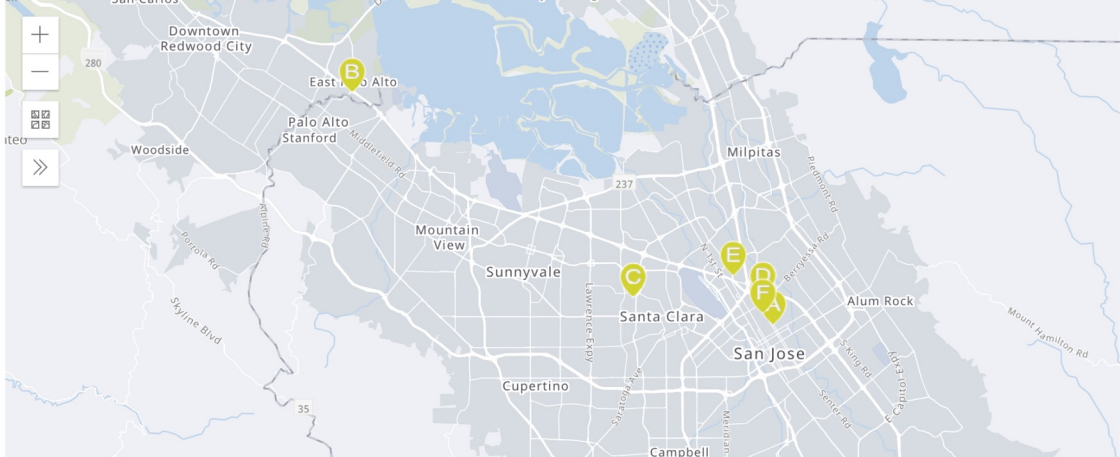
# Outreach & Engagement

## Luke Skywalker Test

PROFILEHISTORYPROGRAMSSERVICESASSESSMENTSNOTESFILESCONTACTLOCATION

CLIENT LOCATION




ADD ADDRESS +



Type Select

Status Active

SEARCH

Address	Last Updated Staff	Type	Location Date
 11 N 6th St, San Jose, California, 95112	Angie Evans 	Address: Client Supplied	06/09/2023 

# MyConnectSV: The Clarity Portal

The screenshot displays the MyConnectSV: The Clarity Portal interface. On the left is a dark sidebar with the 'CLARITY HUMAN SERVICES' logo and a menu including Dashboard, Activity, Assessments, Calendar, Community Info, Documents, Location, Message Center, Privacy, and Resource Directory. The main content area features a 'Welcome Luke Skywalker' header. Below this, a notification states: 'You are currently on the following queue(s): Emergency Shelter Queue - Households Without Children'. The central part of the page is a map titled 'LOCATION' showing the San Jose area with labels for various cities and landmarks. To the right of the map, there are two panels: 'HOUSEHOLD' listing 'Clara Test' and 'Luke Skywalker Test', and 'CARE TEAM' listing 'Alpha Test', 'Angie Evans', 'Elisha Heruty', and 'Isely Soto Bright'. The bottom of the map area includes a footer with map data sources and 'Powered by Esri'.

**CLARITY HUMAN SERVICES**

Dashboard  
Activity  
Assessments  
Calendar  
Community Info  
Documents  
Location  
Message Center  
Privacy  
Resource Directory

**Welcome**  
Luke Skywalker

You are currently on the following queue(s): Emergency Shelter Queue - Households Without Children

**LOCATION**

**HOUSEHOLD**

- Clara Test
- Luke Skywalker Test

**CARE TEAM**

- Alpha Test
- AE Angie Evans
- EH Elisha Heruty
- Isely Soto Bright

County of Santa Clara, California State Parks, Esri, TomTom, Garmin, SafeGraph, METI/NASA, USGS, Bureau of Land Management, Esri. Powered by Esri

# Communicating with CoC Staff & Clients

The image displays two screenshots from a mobile application. The left screenshot shows a client profile for 'Luke Skywalker Test'. It includes a placeholder profile picture, a 'Connected' status indicator, a unique identifier '53DA21C1D', and a 'COMMUNITY QUEUE' section with details about an active entry on the Emergency Shelter Queue. A red arrow points from the 'SEND MESSAGE' button on this profile to the 'CREATE A MESSAGE' dialog box on the right screenshot. The right screenshot shows the 'CREATE A MESSAGE' dialog box with fields for 'CoC' (Santa Clara County CoC), 'Agency' (County: OSH), and 'Receiver' (Leila Qureishi). It also features a text input area with formatting options (B, I, list, link) and 'SEND MESSAGE' and 'CANCEL' buttons. In the background, a message history list is visible, and a red circle highlights a notification icon in the top right corner.

**Client Profile (Left):**

- Profile Picture: Placeholder silhouette
- Status: **Connected**
- UNIQUE IDENTIFIER: **53DA21C1D**
- COMMUNITY QUEUE
- Client has an active entry on the Community Queue: Emergency Shelter Queue - Households Without Children
- [VIEW DETAILS](#)
- SEND MESSAGE**

**Message Creation Dialog (Right):**

- Title: **CREATE A MESSAGE**
- CoC: **Santa Clara County CoC**
- Agency: **County: OSH**
- Receiver: **Leila Qureishi**
- Text Input Area: Includes formatting options (B, I, list, link)
- Buttons: **SEND MESSAGE**, **CANCEL**

**Background Message History (Right):**

- NEW MESSAGE
- SEARCH
- Apr 30, 2024
- Apr 30, 2024
- Apr 19, 2024
- Apr 1, 2024
- Mar 31, 2024

# Coordinated Entry

REFERRALS

Dashboard

Pending

Community Queue

Analysis

Completed

Denied

Sent

Snoozed

Availability

Open Units

Community Queue Prioritization Dashboard

just now

Community Queue Name

Assessment Score

Active ROI?

ROI Issue Identified (Yes / No)

Current Age

Community Housing Queue

025

YesNo

YesNo

1100

Assessment Processor (2)

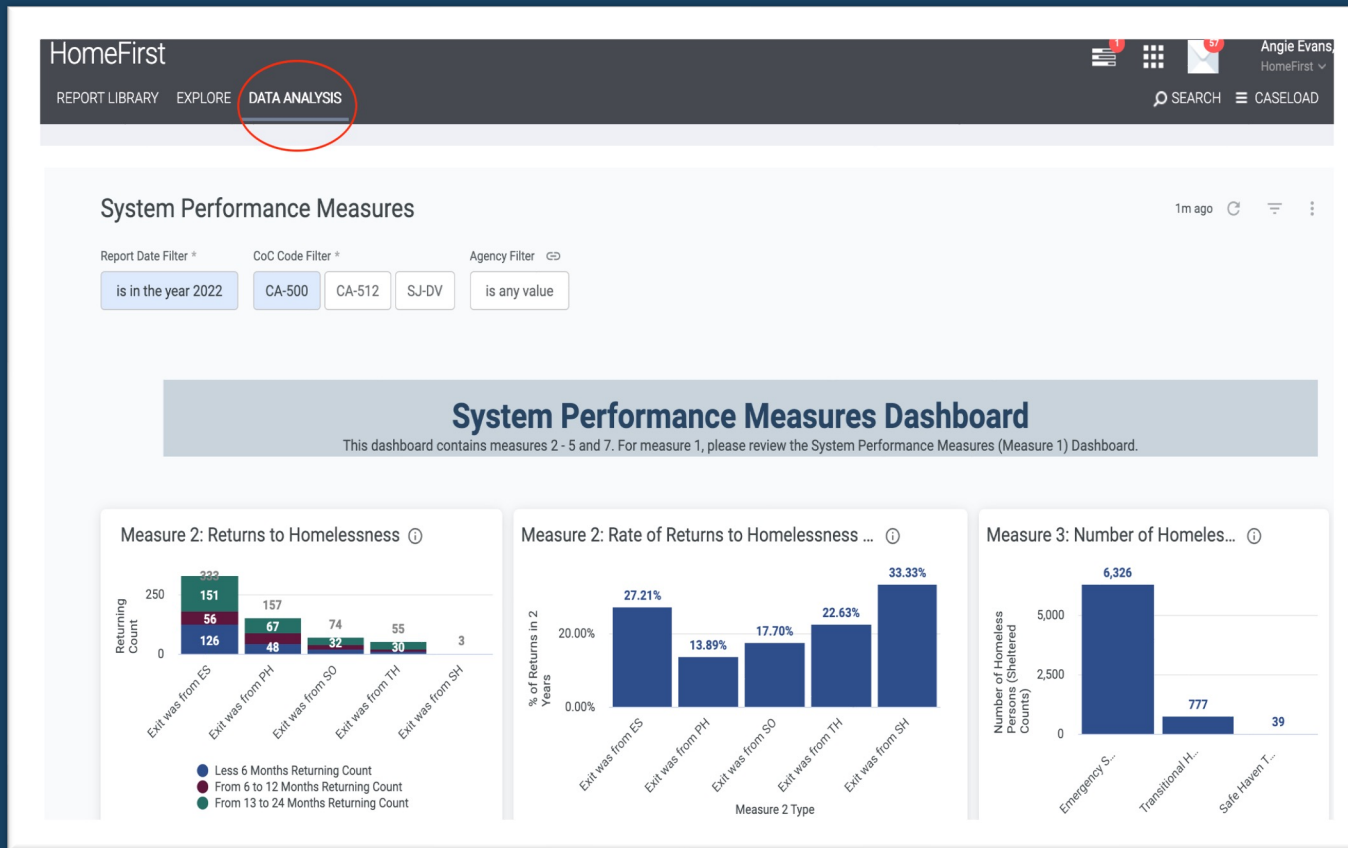
is F-SPDAT for Families (v5.2) or JD-VI-SPDA...

Community Queue Prioritization Dashboard

	Client Full Name	Client ID	Unique Identifier	Assessment Date	Assessment Processor	Assessment Score	Sub Score Risks	How many total years have you been homeless?	Active ROI?	ROI Issue Identified (Yes / No)
1		171967...	5305769...	2023-11-14	VI-F-SPDAT Prescreen f...	21	4	3	Yes	No
2		186145...	0341AE8...	2024-03-15	VI-F-SPDAT Prescreen f...	21	4	6	Yes	No
3		29730...	DA72CD...	2022-08-12	VI-F-SPDAT Prescreen f...	20	4	7	No	No
4		177013...	E863BE3...	2023-04-20	VI-F-SPDAT Prescreen f...	20	4	0	Yes	No
5		100139...	96243D2...	2023-04-25	VI-F-SPDAT Prescreen f...	20	4	12	Yes	No
6		179487...	5EF1985...	2023-06-30	VI-F-SPDAT Prescreen f...	20	4	3	Yes	No
7		181424...	093E1EC...	2024-01-25	VI-F-SPDAT Prescreen f...	20	4	15	Yes	No
8		115027...	6842797...	2024-03-15	VI-F-SPDAT Prescreen f...	20	4	6	Yes	No



# Reporting & In-Depth Data Analysis



# Reporting: Regulatory Compliance

The screenshot displays the HomeFirst application interface. At the top, the 'HomeFirst' logo is on the left, and a notification bell icon with a red '1' is on the right. Below the logo, the 'REPORT LIBRARY' tab is selected and circled in red, with 'EXPLORE' and 'DATA ANALYSIS' as other options. Under 'REPORT LIBRARY', the 'Housing' sub-tab is also circled in red. The main content area is titled 'HUD Reports' and lists several reports with their IDs and titles. Each report has a row of action icons: a star, a play button, 'RUN', a calendar icon, 'SCHEDULE', and 'MORE'. A navigation menu is overlaid on the right side, featuring icons for 'SETUP', 'MANAGE', 'REPORTS' (circled in red), and 'CALENDAR'. Below these are icons for 'ATTENDANCE', 'MERGE', 'DATA IMPORT', and 'INVENTORY'. At the bottom of the menu are 'MASS SENDING' and 'RESOURCE DIRECTORY'.

Report ID	Report Title	Actions
[HUDX-111]	HUD CSV / XML Program Data Export [FY 2024]	★   ⏮ RUN   📅 SCHEDULE   MORE
[HUDX-224]	PATH Annual Report [FY 2024]	★   ⏮ RUN   📅 SCHEDULE   MORE
[HUDX-225]	HMIS Data Quality Report [FY 2024]	★   ⏮ RUN   📅 SCHEDULE   MORE
[HUDX-227]	Annual Performance Report [FY 2024]	★   ⏮ RUN   📅 SCHEDULE   MORE
[HUDX-228]	ESG CAPER [FY 2024]	★   ⏮ RUN   📅 SCHEDULE   MORE
[HUDX-231]	LSA Export - Project-Focused LSA [FY 2023]	★   ⏮ RUN   📅 SCHEDULE   MORE INFO ▾
[HUDX-235]	CE APR [FY 2024]	★   ⏮ RUN   📅 SCHEDULE   MORE INFO ▾
[HUDX-236]	LSA - Project Descriptor HDX Upload Test [FY 20...	★   ⏮ RUN   📅 SCHEDULE   MORE INFO ▾



**Bitfocus**

Clarity Human Services Help  
Center

[Go to bitfocus.com](https://bitfocus.com)

[Request Article Update](#)

# Hello. How can we help?

**Support** - HelpCenter website

**Help Desk:** [SCCSUPPORT@BITFOCUS.COM](mailto:SCCSUPPORT@BITFOCUS.COM)

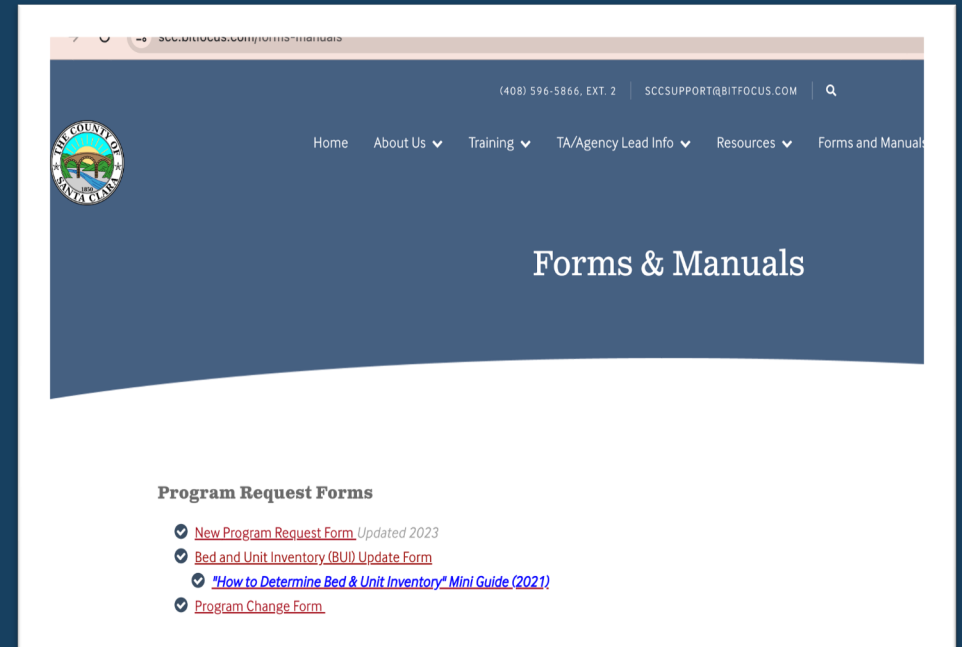
**Phone:** (408) 596-5866, EXT. 2



**Bitfocus**

**Where to find** workflow documents,  
client forms, and get Santa Clara County  
HMIS questions answered:

**scc.bitfocus.com**





# Managing the Client Record

# Managing the Client Record – Searching for Clients In Clarity


## Search

- Search by name , partial name, DOB and SSN

## Create

- If unable to find, create a new profile

SEARCH FOR A CLIENT

ADD CLIENT 

Search by name, partial name, DOB or SSN

SEARCH

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

logged with Clarity Human Services


 Recover deleted data

# Managing the Client Record – Creating New Clients

Please make sure to collect as much information as possible, and avoid using "Client Prefers not to Answer" or Data Not Collected" whenever possible

For existing profiles confirm that all information is correct and up to date

SEARCH FOR A CLIENT

ADD CLIENT 

SEARCH

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

# Managing the Client Record – Client Consent

## Informed Consent:

- Client should understand what they are consenting to.
- Consent form (ROI) should be available for the client to review and take

## Consent Duration:

- Clients only need to consent once which is good for whatever length of time they choose

## Adding an ROI to a New Client Record:

- The information box to the right must be completed

## Consent Documentation

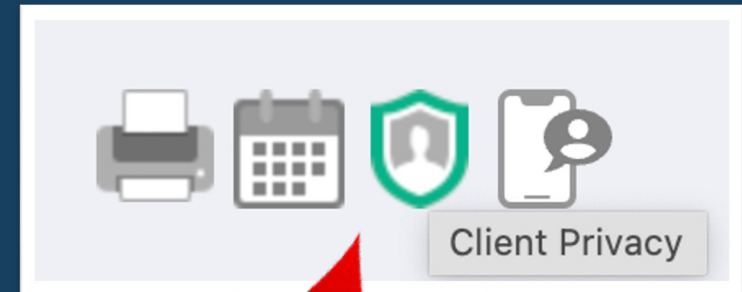
- Electronic Signature: *E-Sign Document* button will display
- Attached PDF: *Select File* button will display to upload file

### RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	04/22/2024	25
End Date	04/22/2027	25
Documentation	<div>✓ Select</div> <div>Electronic Signature</div> <div>Attached PDF</div>	



# Managing the Client Record – Client Consent



Luke Skywalker Test

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

SEARCH

CLIENT PROFILE

Social Security Number	XXX - XX - 7391	
Quality of SSN	Full SSN Reported	
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: 49

Connected

UNIQUE IDENTIFIER  
53DA21C1D

Household Members

Clara Test (She/Her/Hers)

Active Programs

Gavilan College Homeless Prevention

SER CSJ - Street Outreach

Casitas de Esperanza

# Managing the Client Record – Client Consent

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	Electronic Signature	04/30/2024	04/30/2027	V.5 

RELEASE OF INFORMATION


Permission

Yes

▼


Start Date

04/22/2024

 25

End Date

04/22/2027

 25

Documentation

✓ Select

Electronic Signature

Attached PDF

# Managing the Client Record

- The History tab is the "central hub" of the client record.
- It includes a complete history of the service items, program enrollments, referrals, reservations, assessments, and Coordinated Entry Events that have been recorded in a client record.

## Luke Skywalker Test

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

### HISTORY

Advanced search options Hide ^

Search

Category Any category

Agency Any agency

Start Date

End Date

Type Any type

Coordinated Entry

Clear

SEARCH

Service Name	Start Date	End Date
Referral: YHDP Rapid Rehousing (RRH) Razing the Bar referral to St. Andrew's Residential Programs for Youth (STAR) ⓘ	04/24/2024	Pending
Referral to RRH project resource opening:Referral to RRH project r... Razing the Bar ⓘ	04/24/2024	04/24/2024

# Managing the Client Record

- The Global client tab includes the client's profile data, history, programs, any agency-level services or assessments, and notes, files, contact information, and location shared across HMIS
- The Program client tab appears after you select your agency's program.

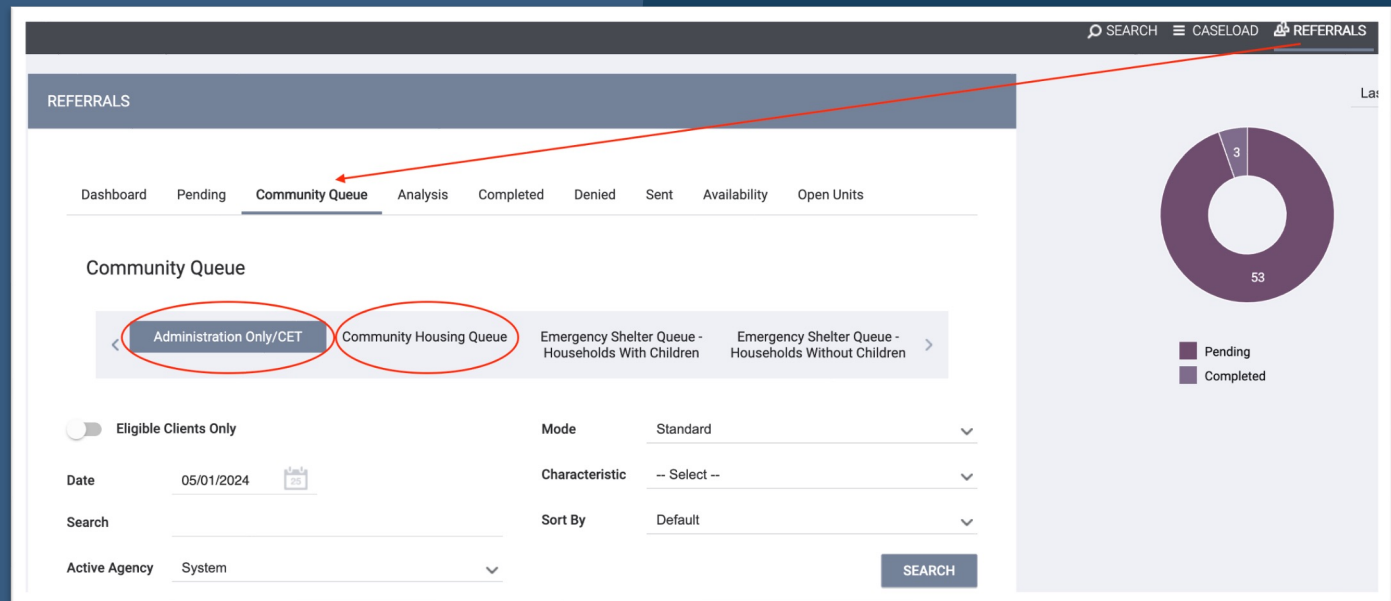
The screenshot displays the Bitfocus client record interface for a client named 'Luke Skywalker Test'. The interface is divided into two main sections: a 'Global Tab' and a 'Program Tab'.

**Global Tab:** This tab is the active view, showing a navigation bar with the following options: PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. Below the navigation bar, the client's profile information is displayed: PROGRAM: [CE] COUNTY: OSH. The 'Enrollment' sub-tab is selected, showing the 'Enroll Program for client Luke Skywalker Test' form. The form includes a 'Project Start Date' field with the value '12/27/2023' and a calendar icon.

**Program Tab:** This tab is highlighted with a red box, indicating it is the next step in the process.

# Managing the Client Record

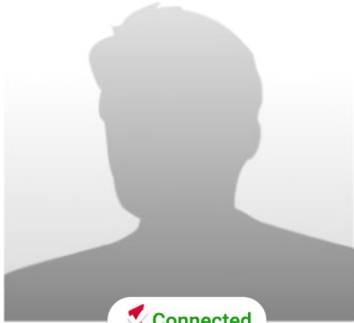
- Clients who need permanent housing and/or subsidies must be referred to the Community Housing Queue
- We have several Community Queues in this community and staff refer to the Community Housing Queue – only Matchmakers refer to the Admin Only/CET Queue



# Managing the Client Record

- Referral History is at the bottom of each referral
- You can see what path the referral has followed and which staff have interacted with the referral

Luke Skywalker Test



Connected

UNIQUE IDENTIFIER  
53DA21C1D

COMMUNITY QUEUE

Client has an active entry on the Community Queue: Emergency Shelter Queue - Households Without Children

VIEW DETAILS

SEND MESSAGE

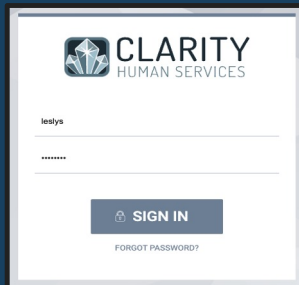
HISTORY		
Activity	Date	Days Pending
Denied: Reassigned to Community Queue: Administration Only/CET	11/20/2023 2023-11-20 10:52:54	46
In Process: [CCP Housing Maintenance] Blossom Hill PBV , Santa Clara County Housing Authority (SCCHA)	10/05/2023 2023-10-05 08:27:39	0
Program Referral: [CCP Housing Maintenance] Blossom Hill PBV, Santa Clara County Housing Authority (SCCHA)	10/05/2023 2023-10-05 08:27:29	0
Added to Community Queue: Administration Only/CET	10/05/2023 2023-10-05 08:27:12	0



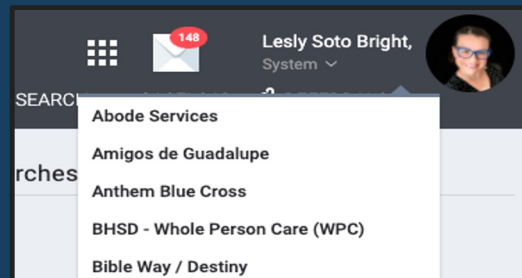
## Reporting: What tools are in Clarity?

# Report Library - Running a Canned Report

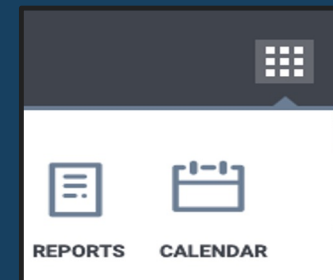
⇒ Log into HMIS



- ⇒ Your Access Role will determine the types of reports you will see
- ⇒ Select the Agency - if multiple access

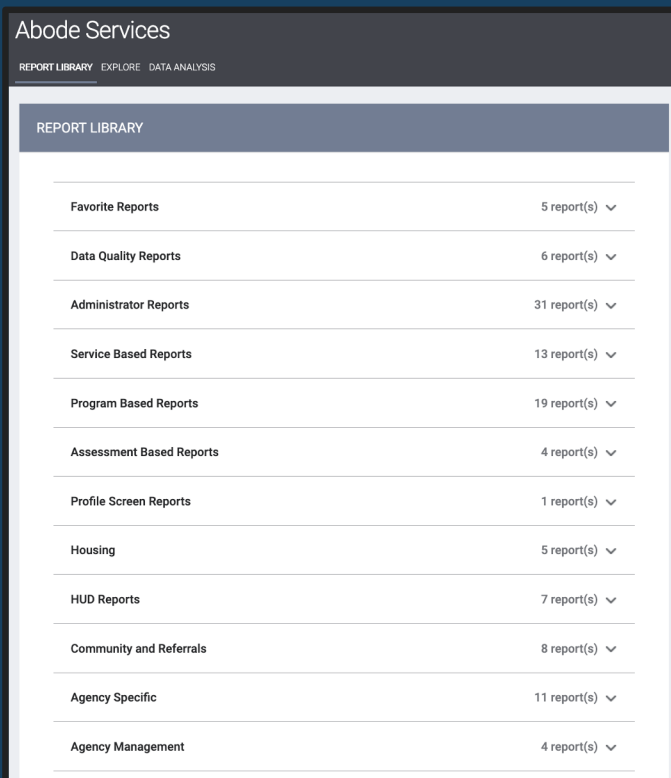


⇒ Navigate to the Reports





# Report Library - Report Anatomy - Library Contents



The screenshot shows the 'Abode Services' header with navigation links for 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. Below this is a 'REPORT LIBRARY' section containing a table of report categories. Each category is listed on the left, and the number of reports is on the right, followed by a downward-pointing caret icon indicating an accordion-style expandable view.

REPORT LIBRARY	
Favorite Reports	5 report(s) ▼
Data Quality Reports	6 report(s) ▼
Administrator Reports	31 report(s) ▼
Service Based Reports	13 report(s) ▼
Program Based Reports	19 report(s) ▼
Assessment Based Reports	4 report(s) ▼
Profile Screen Reports	1 report(s) ▼
Housing	5 report(s) ▼
HUD Reports	7 report(s) ▼
Community and Referrals	8 report(s) ▼
Agency Specific	11 report(s) ▼
Agency Management	4 report(s) ▼

- The **Report Library** is where all canned reports are housed
- Reports are separated by Category and listed in alphanumeric order within the category
- The right hand side column denotes the number of reports per category
- Using the caret will open up - in an accordion style - the different reports found in that category

# Report Library - Report Anatomy - Types of Reports

Abode Services

REPORT LIBRARY EXPLORE DATA ANALYSIS

REPORT LIBRARY

Favorite Reports	5 report(s) ▼
Data Quality Reports	6 report(s) ▼
Administrator Reports	31 report(s) ▼
Service Based Reports	13 report(s) ▼
Program Based Reports	19 report(s) ▼
Assessment Based Reports	4 report(s) ▼
Profile Screen Reports	1 report(s) ▼
Housing	5 report(s) ▼
HUD Reports	7 report(s) ▼
Community and Referrals	8 report(s) ▼
Agency Specific	11 report(s) ▼
Agency Management	4 report(s) ▼

<b>Favorite Reports</b>	Reports that are run very often using the same parameters can now be saved as "favorites"
<b>Data Quality Reports</b>	Reports that help identify DQ issues with data
<b>Admin. Reports</b>	Typically used to monitor staff and program utilization
<b>Service Based Reports</b>	Reports that are based on services provided to a client
<b>Program Based Reports</b>	Reports that are based on Program Data
<b>Housing</b>	Reports based on housing information - your program must offer housing
<b>HUD Reports</b>	Reports used to assist in DQ checks during Federal Reporting
<b>Community &amp; Referral</b>	Reports based on Assessment and/or Referral Data
<b>Agency Specific</b>	Reports that are specific to your Agency set-up - based on types of programs at your agency (in most cases these are custom)

# Report Library - How To Run Reports

1. Select the report from the report category of choice
2. Use the caret to expand the selection within the category
3. Find the report
4. You will see four options

**Star** - use this to make the report a favorite

**Run** - Begin running the report after you select the parameters

**Schedule** - To have reports automatically run and then sent out

**More Info** - Not sure what this report is about, click the MORE INFO and you will either see a description of the report or be redirected to a link with further information



The screenshot displays the 'REPORT LIBRARY' interface. It features a 'Data Quality Reports' section with a list of reports. The report '[GNRL-106] Program Roster' is highlighted with a yellow border. A magnifying glass icon is positioned over the 'MORE INFO' link for this report. Below the main interface, a detailed description of the '[GNRL-106] Program Roster' report is shown, explaining that it lists program stay information for clients with the selected status in the selected programs. The status options are: Active within report date range- meaning that the client's project stay is active at least one day within the report date range (use this option to capture all clients active at any time within the date range), Enrolled within report date range- meaning the client's enrollment date is within the selected report date range, and Exited within report date range- meaning the client's exit date is within the selected report date range. Also, a client will be listed more than once if they have enrolled in a program more than once in the report date range, or if they have enrolled in more than one program when multiple programs are selected.

**REPORT LIBRARY**

**Favorite Reports** 6 report(s) ▾

**Data Quality Reports** 6 report(s) ▾

**Data Quality Reports** 6 report(s) ^

[DQXX-102] Program Data Review ★ | ⏮ RUN | 📅 SCHEDULE | MORE INFO ▾

[GNRL-106] Program Roster ★ | ⏮ RUN | 📅 SCHEDULE | MORE INFO ▾

[GNRL-106] Program Roster ★ | ⏮ RUN | 📅 SCHEDULE | LESS INFO ▾

This program-based report lists program stay information for clients with the selected status in the selected programs. The status options are: Active within report date range- meaning that the client's project stay is active at least one day within the report date range (use this option to capture all clients active at any time within the date range), Enrolled within report date range- meaning the client's enrollment date is within the selected report date range, and Exited within report date range- meaning the client's exit date is within the selected report date range. Also, a client will be listed more than once if they have enrolled in a program more than once in the report date range, or if they have enrolled in more than one program when multiple programs are selected.

Program Roster

# Report Library - Report Anatomy

**REPORT LIBRARY**

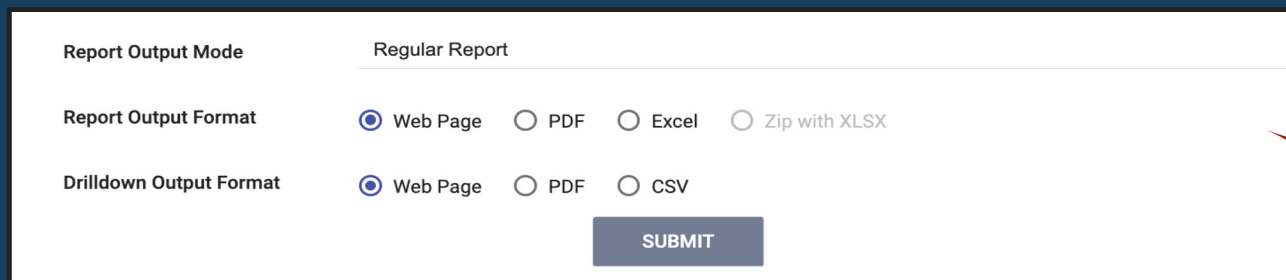
## HUD Reports > [HUDX-225] HMIS Data Quality Report [FY 2022]

Switch Access Agency(-ies)	California Youth Outreach (breakout Prison dba) Campbell Union School District Cathedral Basilica of St. Joseph Catholic Charities Center for Employment Training (CET) <b>Charities Housing</b>
CoC Filter Category	Choose...
CoC	Choose...
Program Type(s)	Emergency Shelter Transitional Housing PH - Permanent Supportive Housing (disability required for entry) Services Only Street Outreach Other
Program Status	Choose...
Continuum Project	All
Program(s)	Choose...  <div> <input type="text"/> / <input type="text"/> <input type="button" value="Add"/> <span style="margin-left: 20px;">-</span> <input type="text"/> / <input type="text"/> <input type="button" value="Add"/> </div>
Report Date Range	<input type="text"/> / <input type="text"/> <input type="button" value="Select"/> <span style="margin-left: 20px;">-</span> <input type="text"/> / <input type="text"/> <input type="button" value="Select"/>
Report Output Mode	Regular Report
Report Output Format	<input checked="" type="radio"/> Web Page <input type="radio"/> PDF <input type="radio"/> Excel <input type="radio"/> Zip with XLSX
Dropdown Output Format	<input checked="" type="radio"/> Web Page <input type="radio"/> PDF <input type="radio"/> CSV

**SUBMIT**

<b>Switch Access Agency</b>	Select the Agency you want to run the report for - this will be dependent on access role
<b>CoC Filter Category</b>	Always select Agency CoC
<b>CoC</b>	Always select Santa Clara County
<b>Program Type</b>	Select the Project Type you want to pull data for (i.e., ES, TH, SH, PSH, Services only or Street Outreach, or ALL)
<b>Program Status</b>	Select from All, Active, or Inactive Programs - these are programs at your agency - what is listed will be dependent on access role
<b>Continuum Project</b>	Always select YES - unless directed differently from your Agency Lead
<b>Program(s)</b>	If not choosing ALL programs, then select only the ones you are interested in getting data for from the list provided
<b>Report Date Range</b>	Enter time frame you want to pull data for - the dates you want the report to pull

# Report Library - Report Anatomy

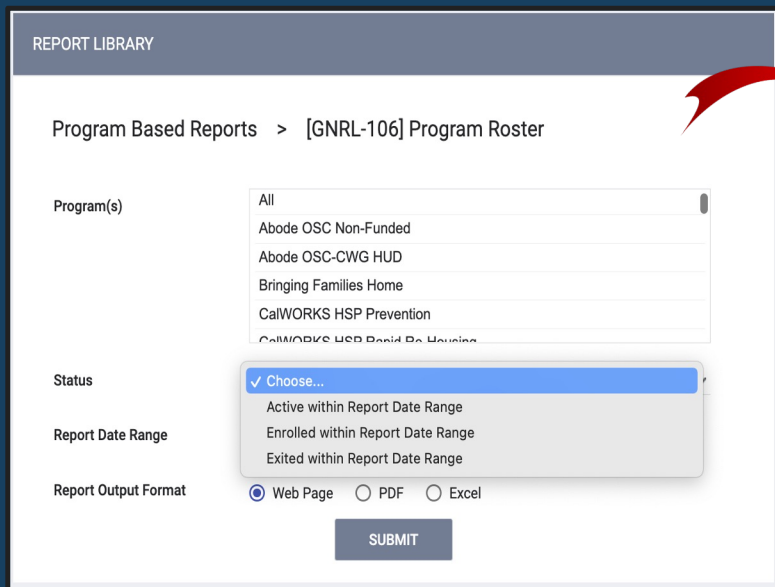


The screenshot shows a form titled 'Report Library - Report Anatomy'. It contains three sections: 'Report Output Mode' with a dropdown menu set to 'Regular Report'; 'Report Output Format' with four radio button options: 'Web Page' (selected), 'PDF', 'Excel', and 'Zip with XLSX'; and 'Drilldown Output Format' with three radio button options: 'Web Page' (selected), 'PDF', and 'CSV'. A 'SUBMIT' button is located at the bottom right of the form. A red arrow points from the right side of the form towards the table below.

Report Output Mode	Depending on the report you are running, you may want a general report that is more concise or a details report that will show you more information and where it is pulled from specifically - not all reports will have this option	
Report Output Format	This depends on what you want to do with the data or how you want to see it	Web Page - will just populate on your screen PDF - will offer a downloadable PDF file Excel - will offer an Excel file
Drilldown Output Format	This option will pull the data, but it will link data directly to a client, this uses a hyperlink that will redirect you to the client and the specific data point being reviewed	

# Report Library - Report Anatomy

*This is another example of report parameters you will see in HMIS when running different types of reports.*



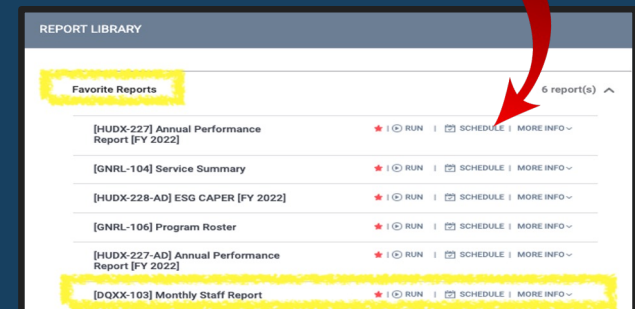
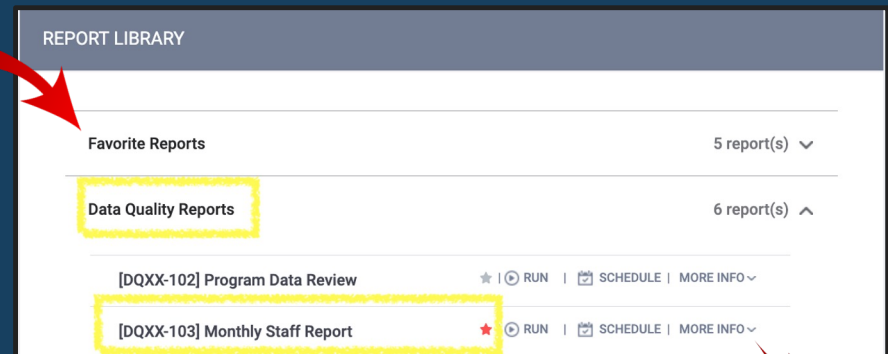
The screenshot shows a web interface titled "REPORT LIBRARY". Below the title, it says "Program Based Reports > [GNRL-106] Program Roster". There are four main sections for parameter selection: "Program(s)" with a dropdown menu showing options like "All", "Abode OSC Non-Funded", "Abode OSC-CWG HUD", "Bringing Families Home", "CalWORKS HSP Prevention", and "CalWORKS HSP Rapid Re-Housing"; "Status" with a dropdown menu showing "Choose...", "Active within Report Date Range", "Enrolled within Report Date Range", and "Exited within Report Date Range"; "Report Date Range" which is currently empty; and "Report Output Format" with radio buttons for "Web Page", "PDF", and "Excel". A "SUBMIT" button is at the bottom right of the form.

<b>Program(s)</b>	Select the Program you want to run the report for - this will be dependent on access role	
<b>Status</b>	Select if you want to pull clients that are: Active within Report Date Range Enrolled within the Report Date Range Exited within Report Date Range	
<b>Report Date Range</b>	Enter time frame you want to pull data for - the dates you want the report to pull	
<b>Report Output Format</b>	This depends on what you want to do with the data or how you want to see it	Web Page - will just populate on your screen PDF - will offer a downloadable PDF file Excel - will offer an Excel file

# Report Library - Report Anatomy - Favorites

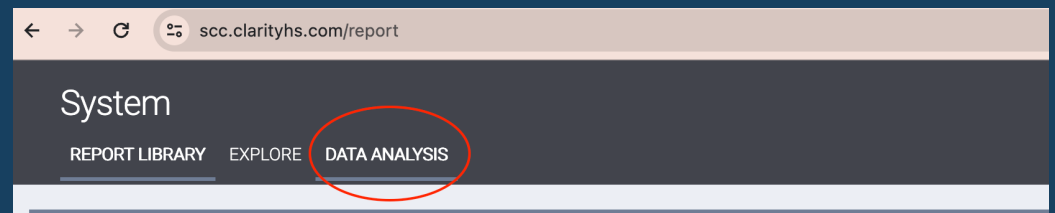
Have a report that is run often - save it as a Favorite

- ✓ From the Report Library identify the report category
- ✓ The ★ icon will set the report as a Favorite
- ✓ Now run the report and enter the selected parameters - once this is done the report will appear in your favorites list
- ✓ Check your Favorite Reports to see it listed



# Report Library – Data Analysis tab reports

- ✓ The Data Analysis tab is prepopulated with Looker-based reports built by the CoC, Bitfocus, or other agency staff
- ✓ The Explore tab allows you to build and save a new Looker-based report





# Where can I learn more?



## Recorded Data Engagement (DEW)

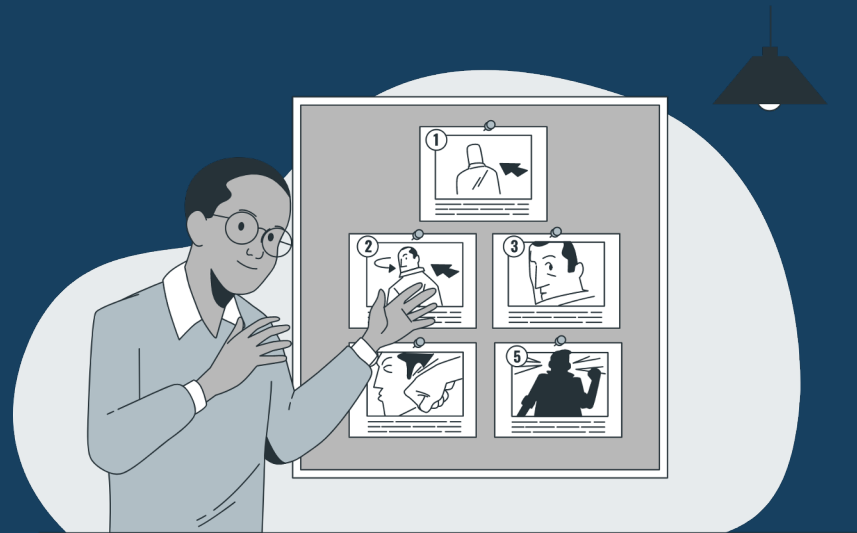
4 of 4 lessons completed (100%)

Curriculum

About this course

### Course Overview

- ✓ Data Quality and AB 977
- ✓ Navigating the HMIS Report Library & Data Analysis 201 (September 2022)
- ✓ Navigating the HMIS Report Library & Data Analysis (June 2022)
- ✓ All Things Client Related - Data Entry 101 (March 2022)



# Scenarios - Hands on Learning

## DISCUSS WITH GROUP

Proposed Group Activities for 30 minutes

- **Breakout Group 1:** Run a program-based report [GNRL 400 vs GNRL 200] (Nate + Leila)
- **Breakout Group 2:** Run a program-based report [HUDX-225 vs APR] (Marcell)
- **Breakout Group 3:** Run a program-based report [HUDX-225 vs APR] (Lesly)
- **Main Room:** Continue demo on workflows, if needed (Angie)



# Questions, Comments or Concerns?

## Reference Sheet:

Workflow documents, FAQs, and pdf forms, visit the [Forms and Manuals page](#) on our website

Training recording website includes a lot of relevant recordings:  
[Data Engagement Workshop recordings:](#)  
>>>>>[Canned Reports training](#)  
>>>>>[Looker Reports training](#)



## Report Categories

Favorite Reports	Reports that are run very often using the same parameters can now be saved as "favorites"
Data Quality Reports	Reports that help identify DQ issues with data
Admin. Reports	Typically used to monitor staff and program utilization
Service Based Reports	Reports that are based on services provided to a client
Program Based Reports	Reports that are based on Program Data
Housing	Reports based on housing information - your program must offer housing
HUD Reports	Reports used to assist in DQ checks during Federal Reporting
Community & Referral	Reports based on Assessment and/or Referral Data
Agency Specific	Reports that are specific to your Agency set-up - based on types of programs at your agency (in most cases these are custom)

[Images provided by Storyset.com](#)

# Resources

Contact Information	Type of Assistance
SCC-ADMIN@BITFOCUS.COM	<i>Use this email to contact your sys. admin. team: Angie and Lesly</i>
SCCSUPPORT@BITFOCUS.COM	<i>Use this email to contact the Help Desk. They can assist with almost everything, and if they can't they will loop your sys. admin. team.</i>
HELP.BITFOCUS.COM	<i>Use this to get help on all things HMIS. Type in your question in the search bar and get articles and how to steps.</i>
SCC.BITFOCUS.COM	<i>Use this to get insight into all things SCC HMIS related. From New User Training, to Forms and Newsletters and so much more! <b>If you have not already, you should bookmark this page.</b></i>