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

Bitfocus

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)

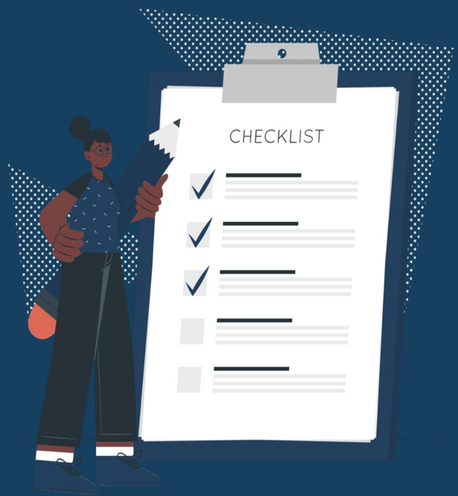
10:25am – 10:40am: Managing the Client Record (Lesly)

10:40am – 10:55am: Reporting (Angie)

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

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

11:30am – 12:00pm: Debrief



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Clarity System: Overview

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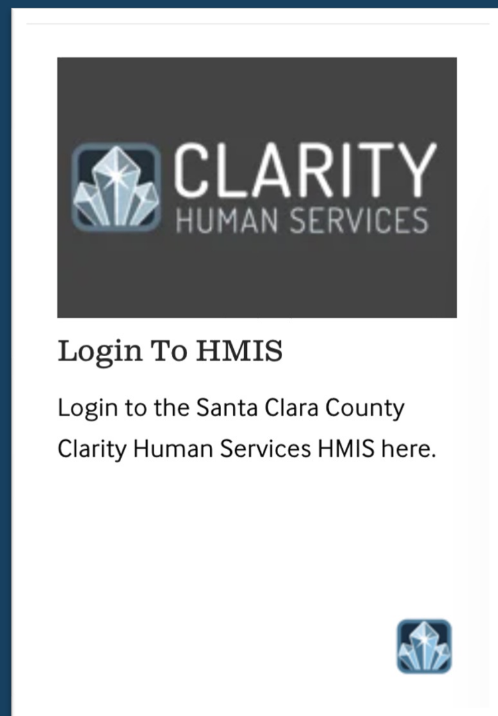
Clarity System: Overview



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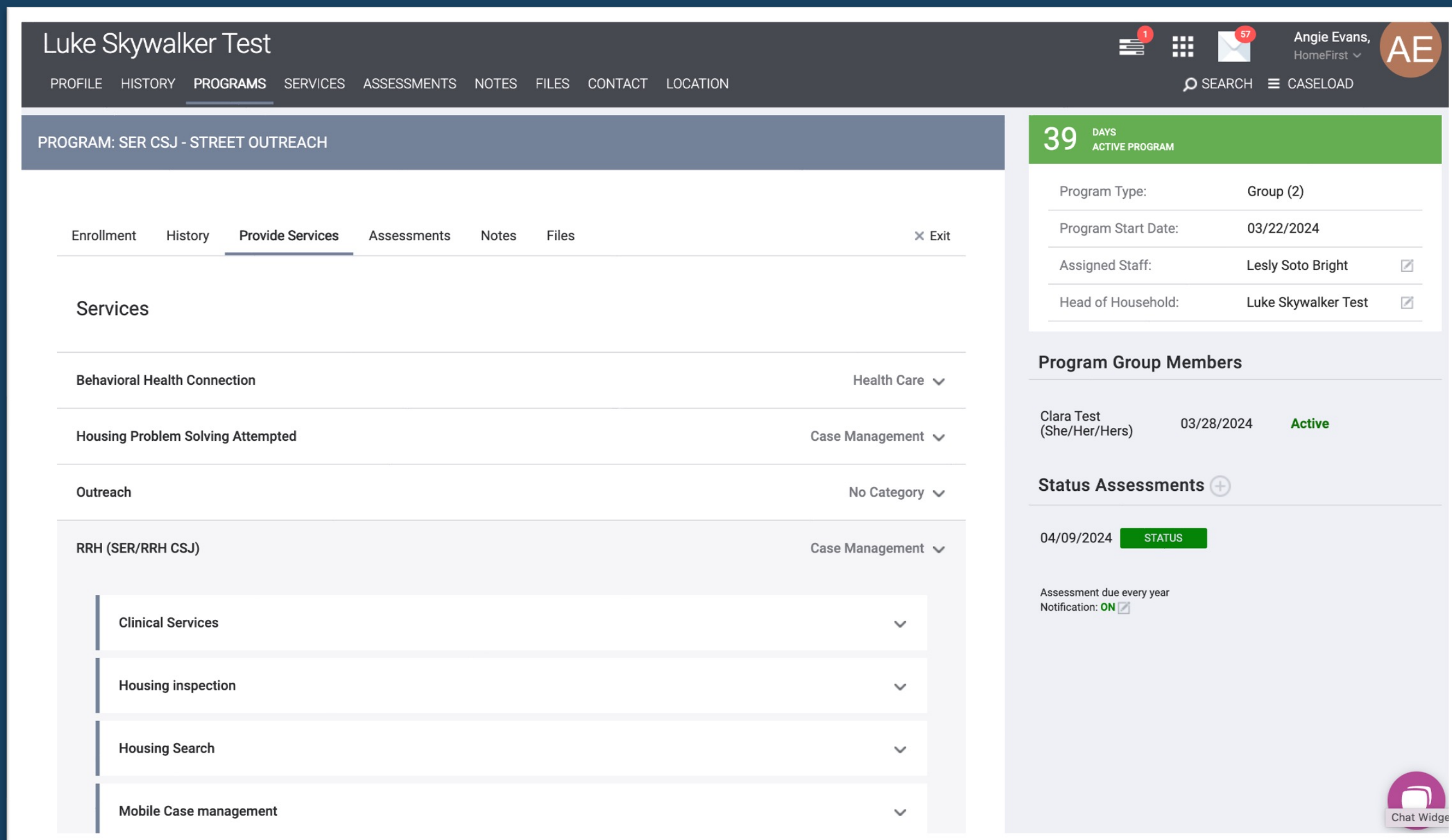
Case Management



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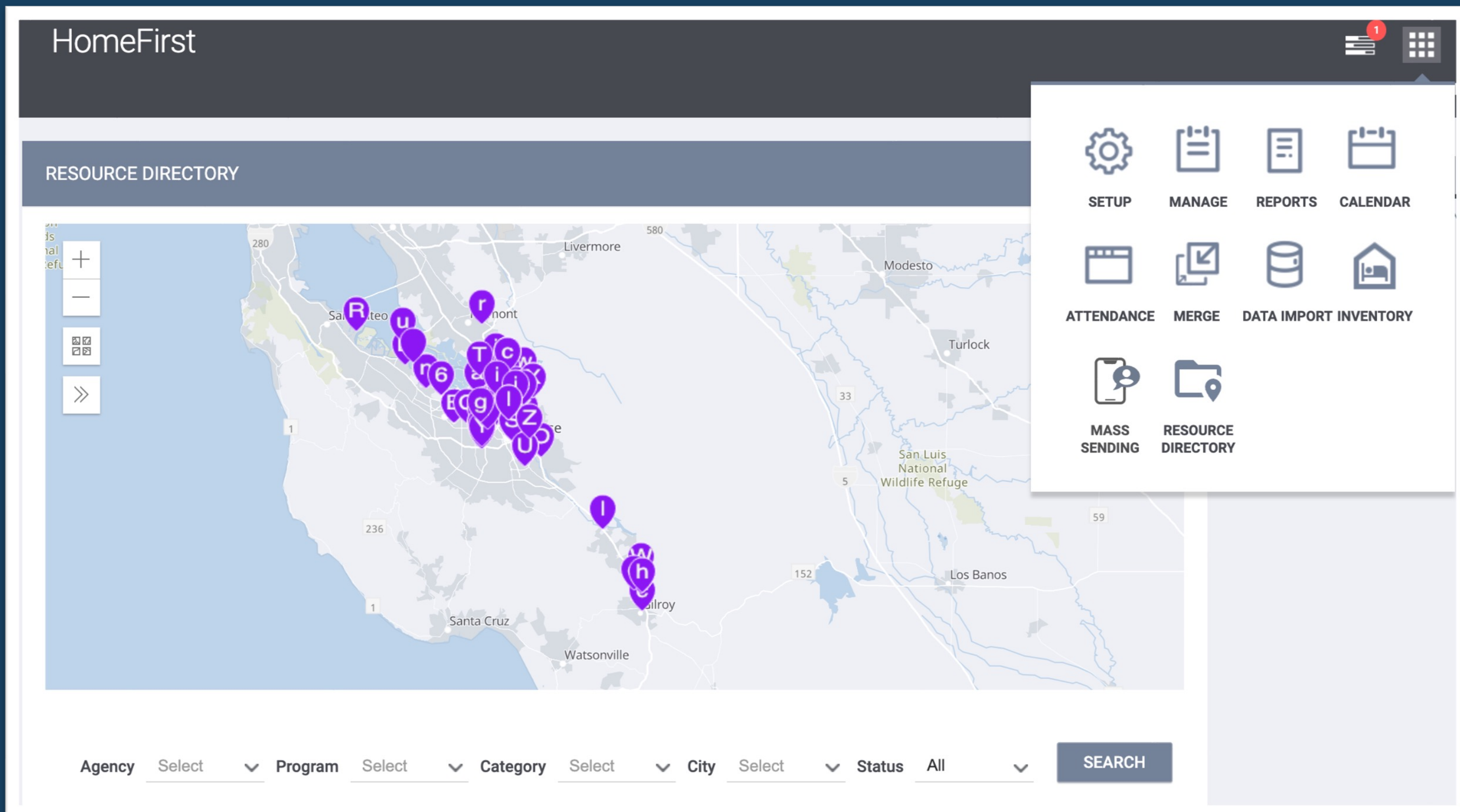
Resource Directory



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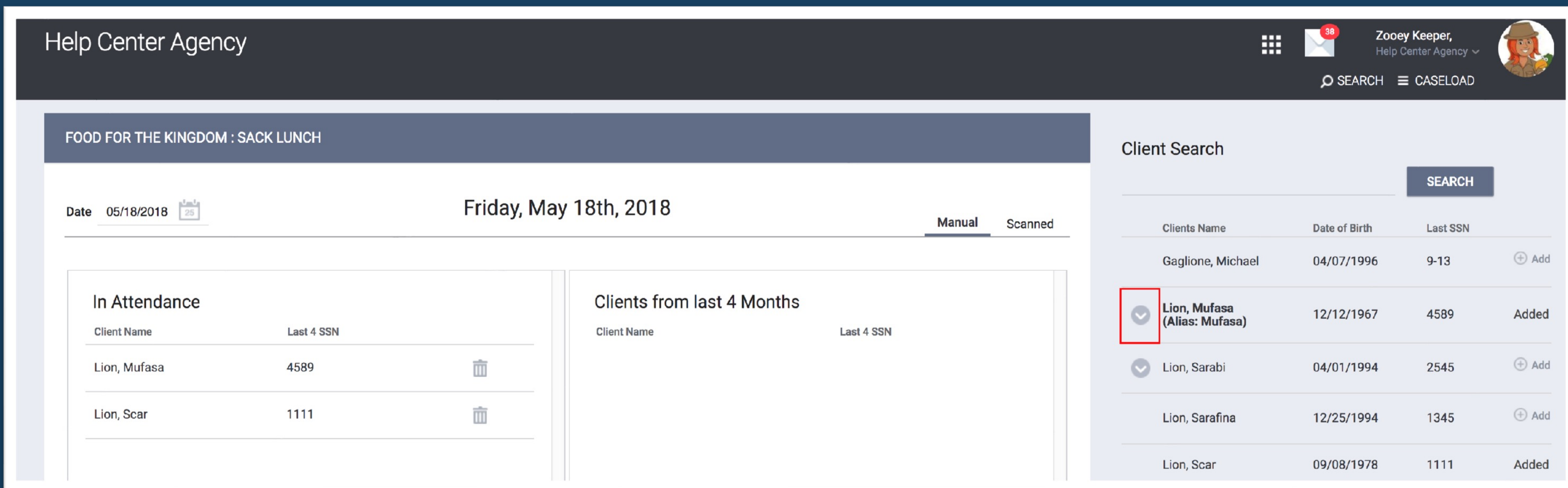
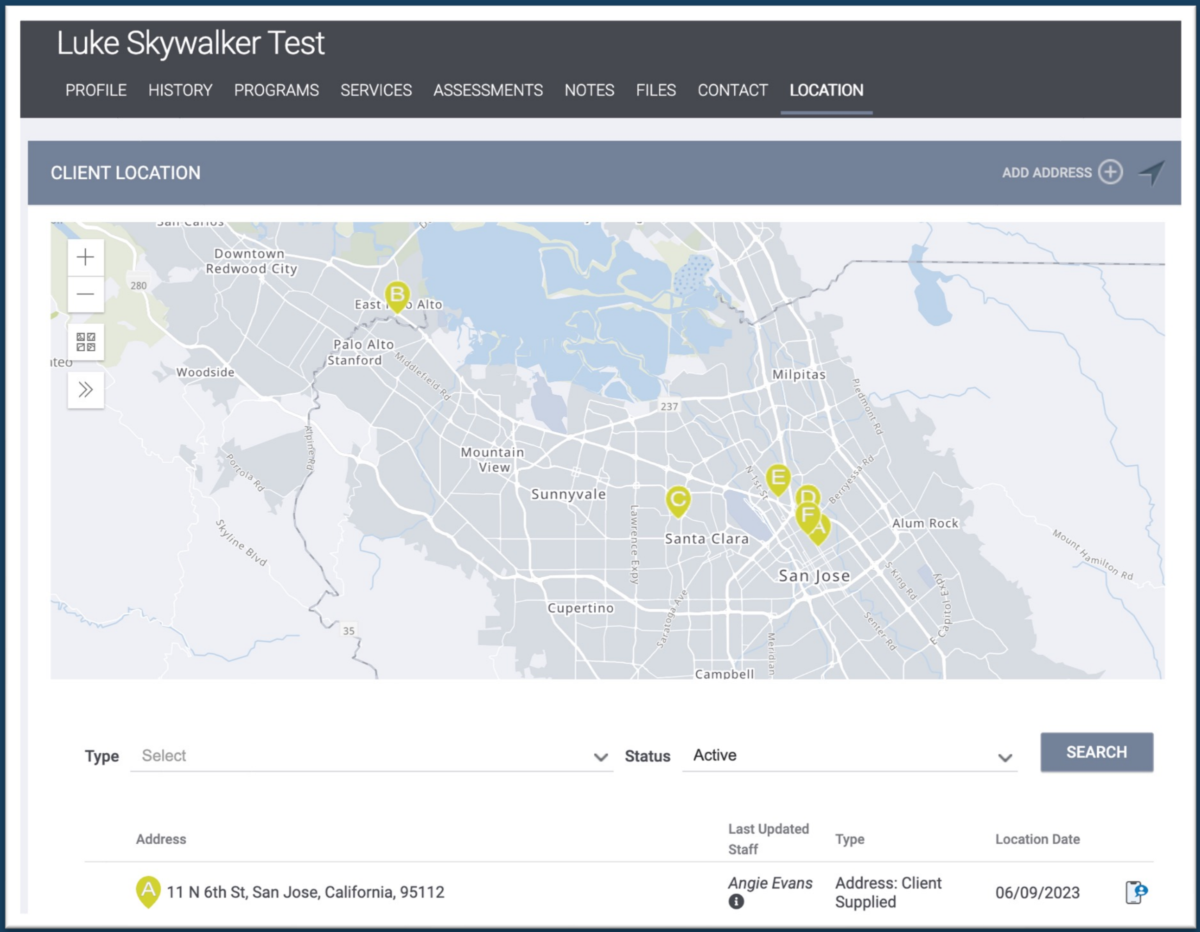
Attendance Services



Outreach & Engagement



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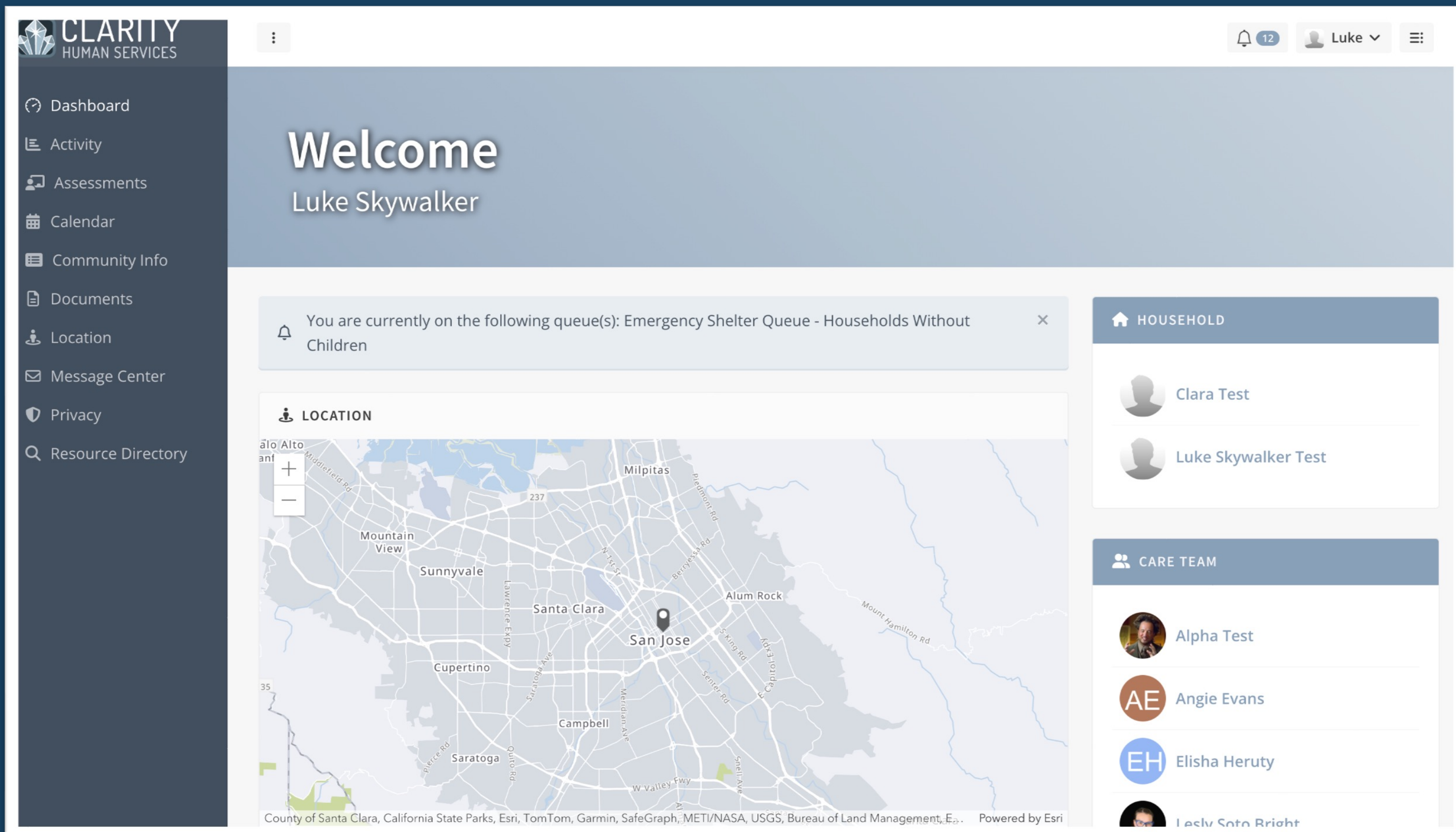
MyConnectSV: The Clarity Portal



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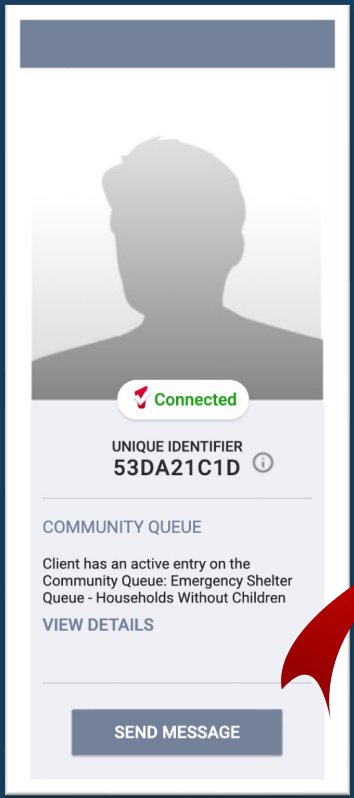
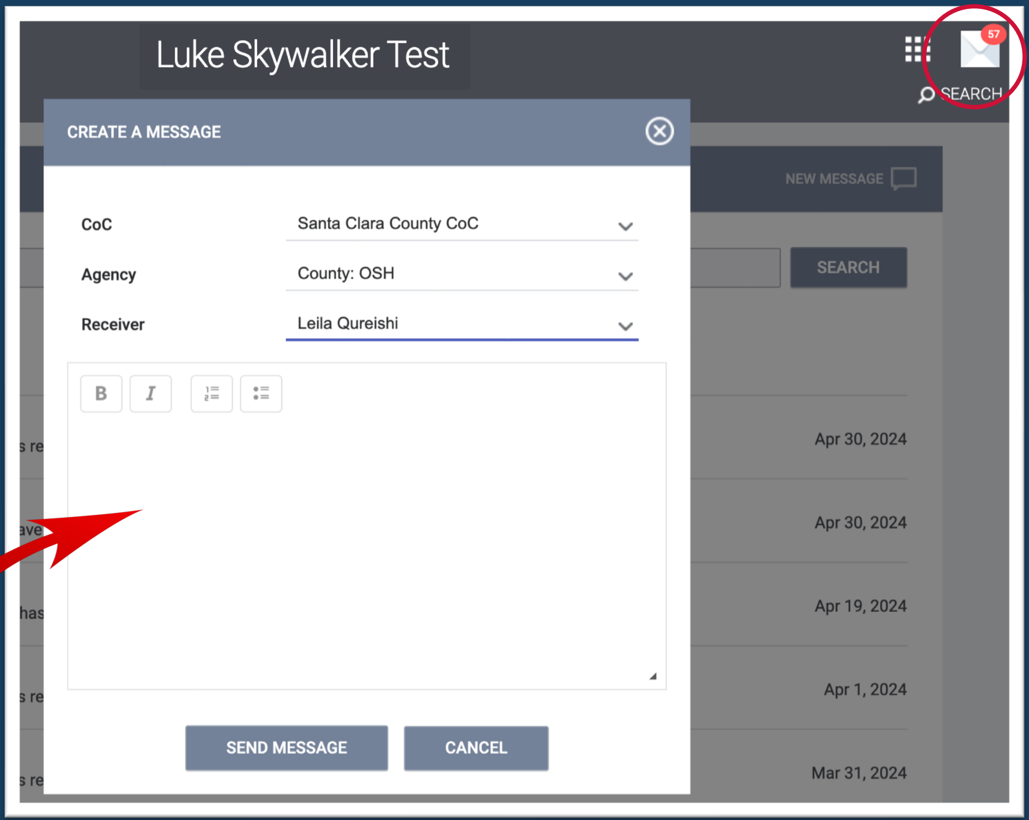
Communicating with CoC Staff & Clients





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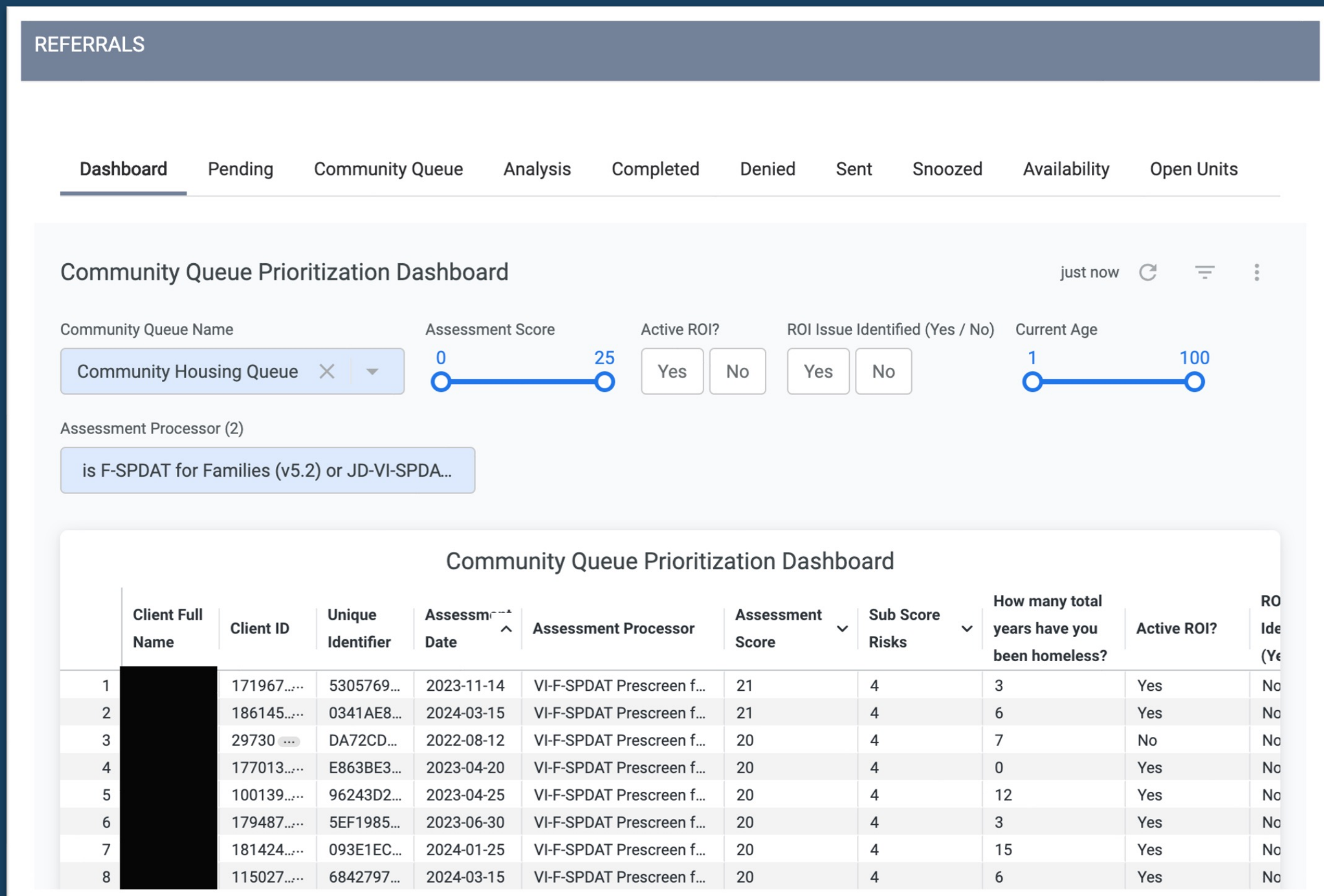
Coordinated Entry



REFERRALS

Dashboard | Pending | Community Queue | Analysis | Completed | Denied | Sent | Snoozed | Availability | Open Units

Community Queue Prioritization Dashboard

just now

Community Queue Name: Community Housing Queue

Assessment Score: 0 – 25

Active ROI?: Yes / No

ROI Issue Identified (Yes / No): Yes / No

Current Age: 1 – 100

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	Assessm Date	Assessment Processor	Assessment Score	Sub Score Risks	How many total years have you been homeless?	Active ROI?	RO Ide (Ye
1	[redacted]	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

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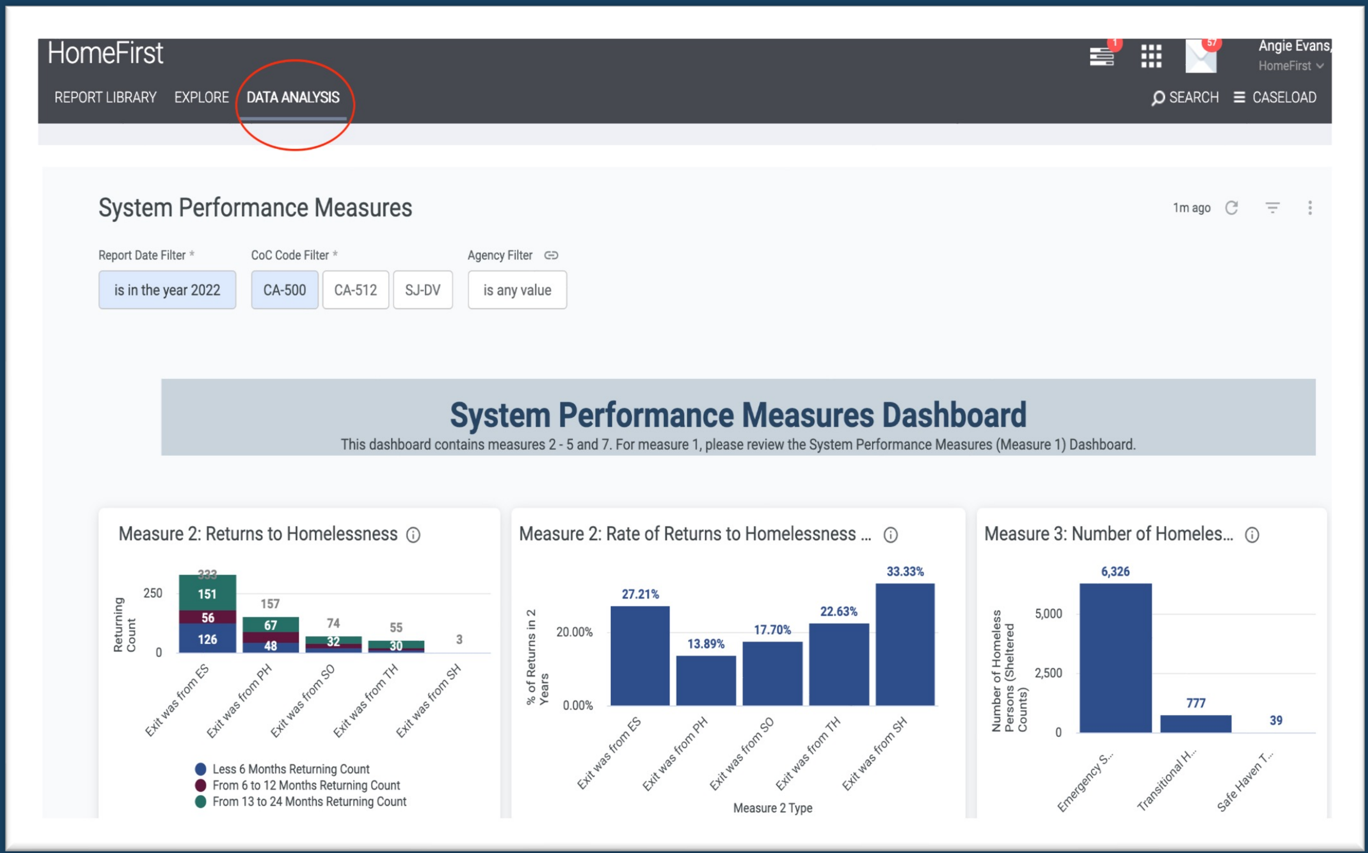
Reporting & In-Depth Data Analysis



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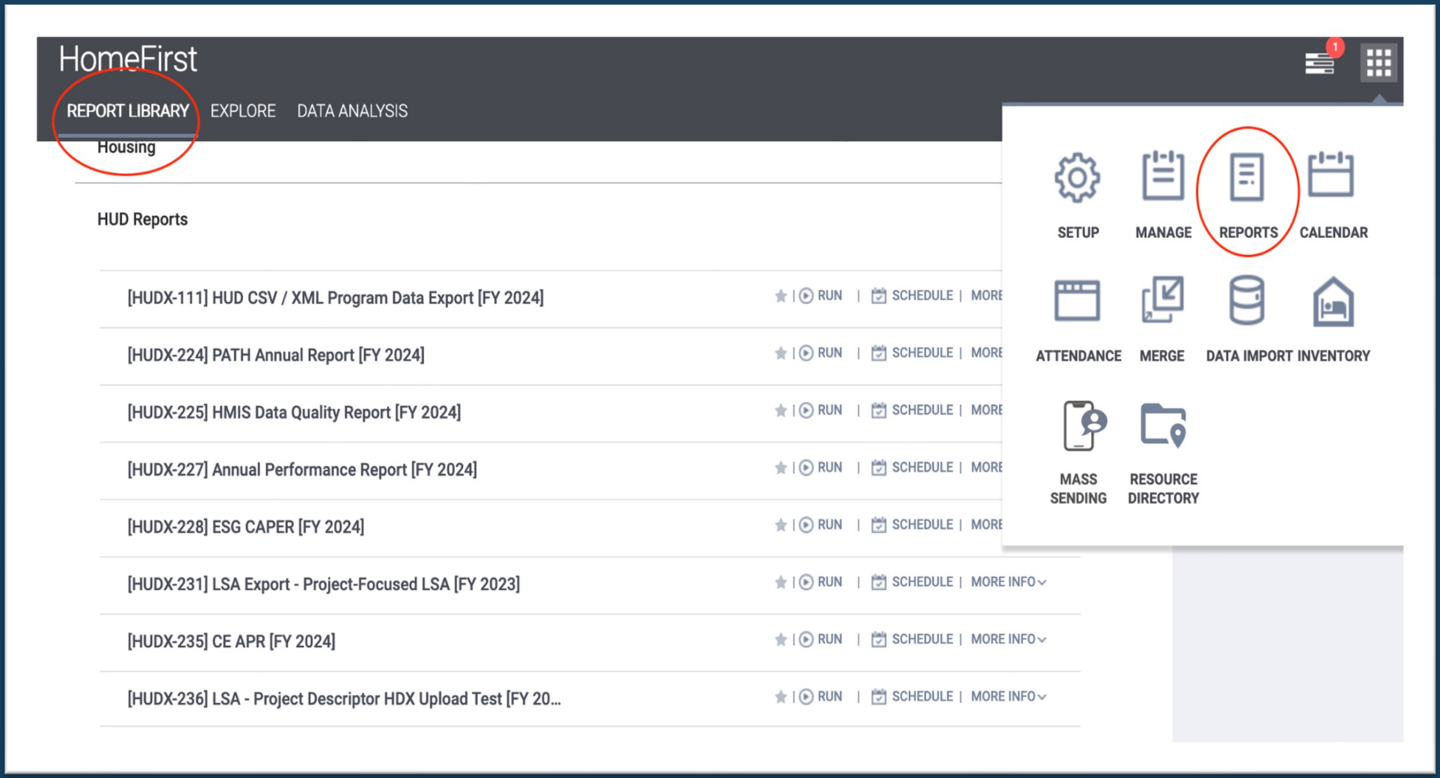
Reporting: Regulatory Compliance



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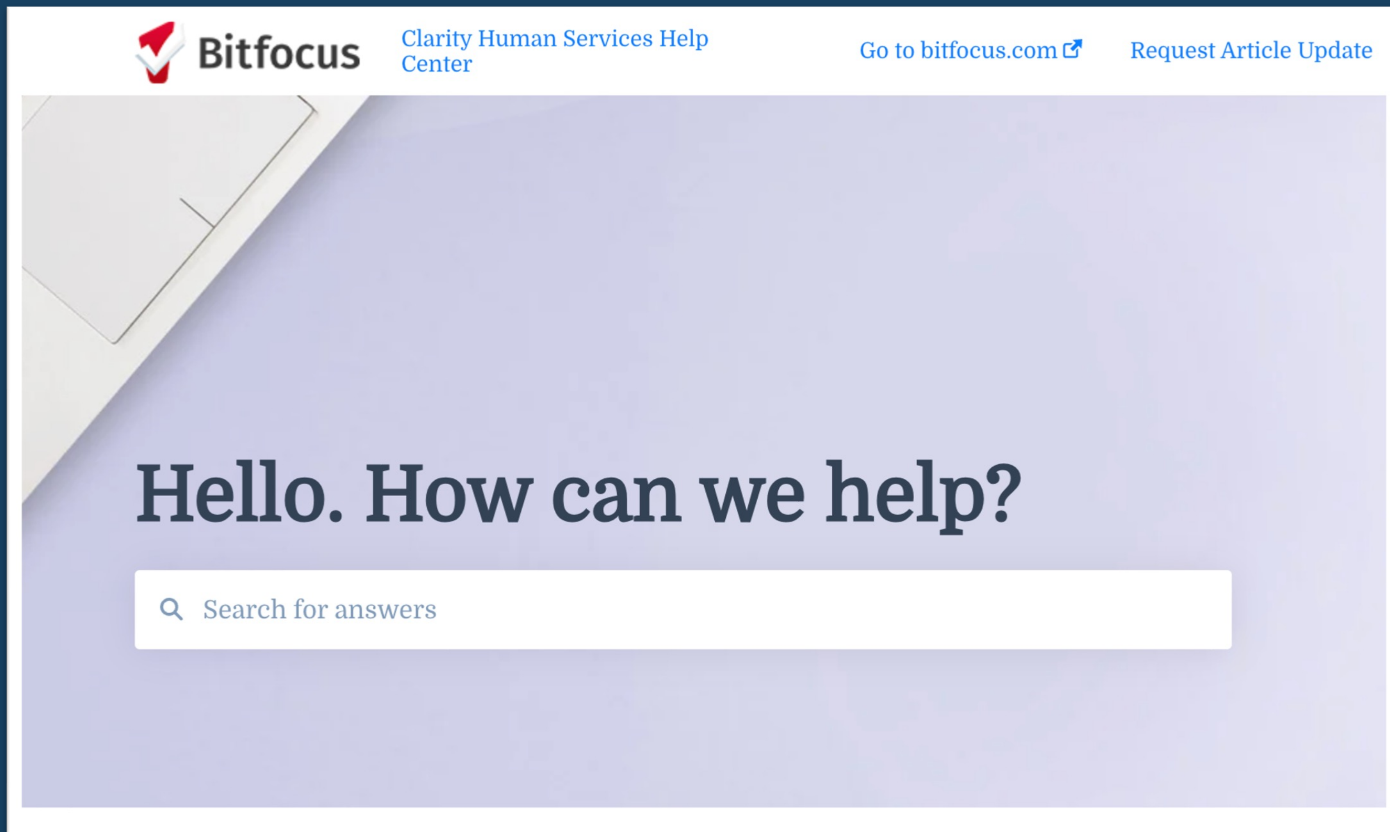

Support - HelpCenter website

Help Desk: SCCSUPPORT@BITFOCUS.COM
Phone: (408) 596-5866, EXT. 2

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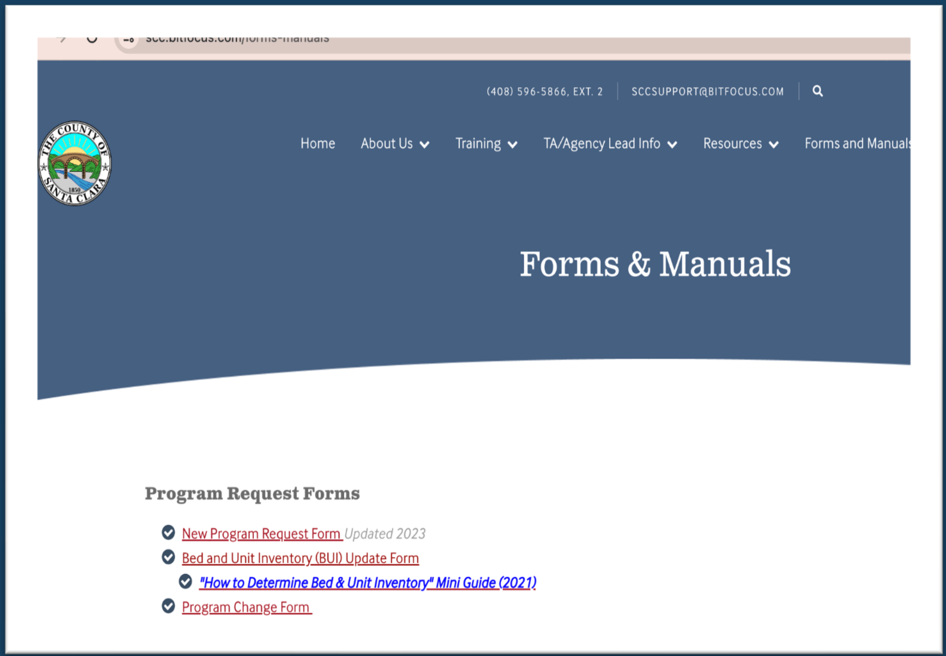
Where to find workflow documents, client forms, and get Santa Clara County HMIS questions answered:

scc.bitfocus.com



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Managing the Client Record

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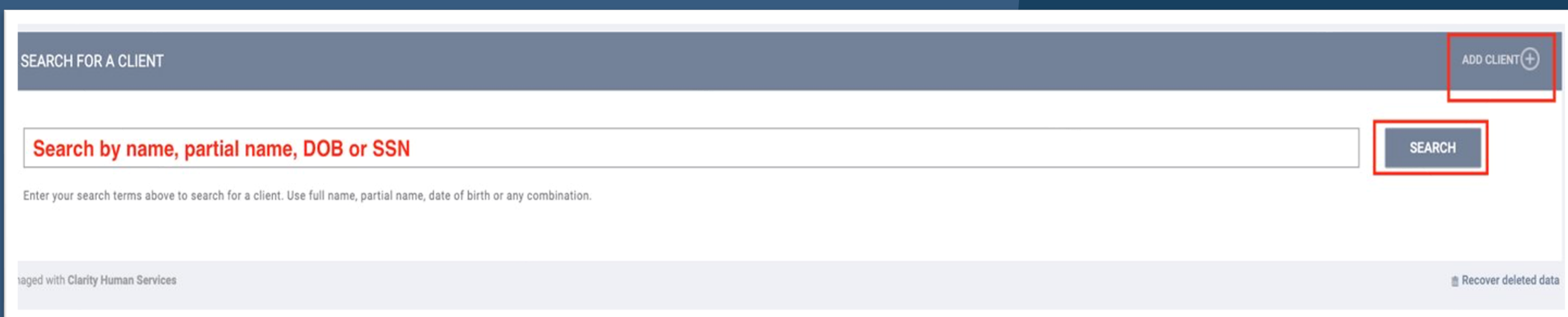
Managing the Client Record – Searching for Clients In Clarity

Search

- Search by name , partial name, DOB and SSN

Create

- If unable to find, create a new profile



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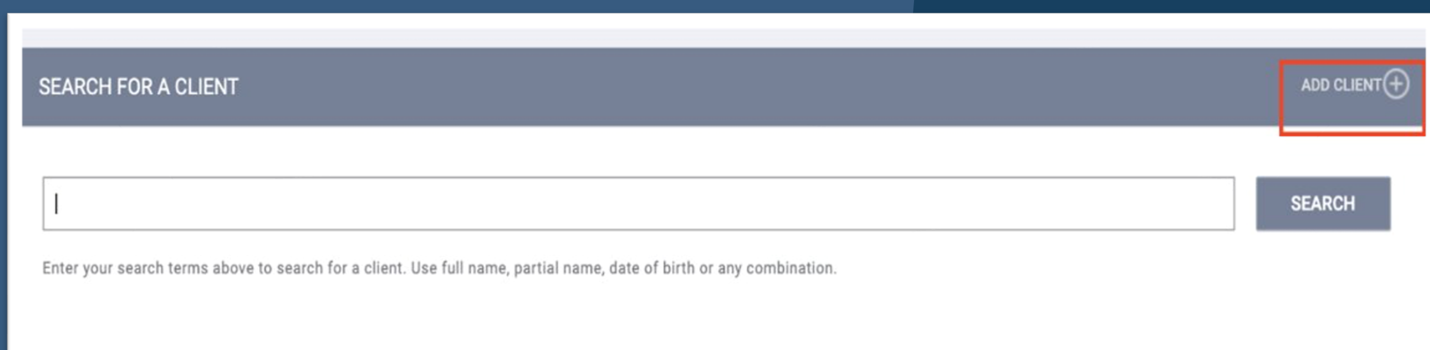
Managing the Client Record – Creating New Clients

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



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:

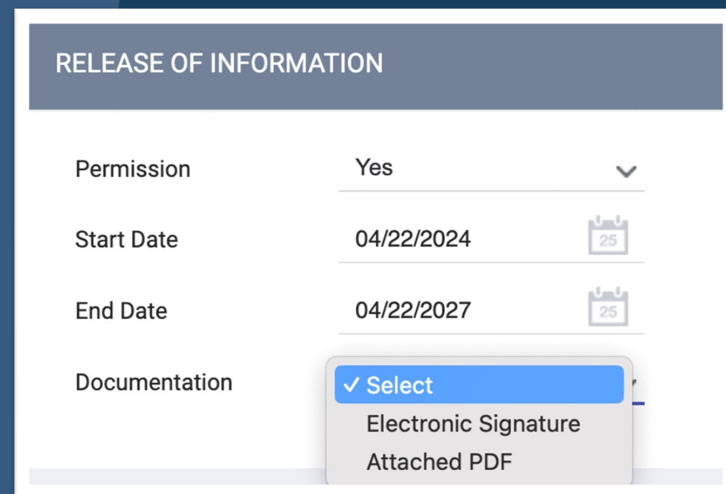
- Clients only need to consent once which is good for whatever length of time they choose

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



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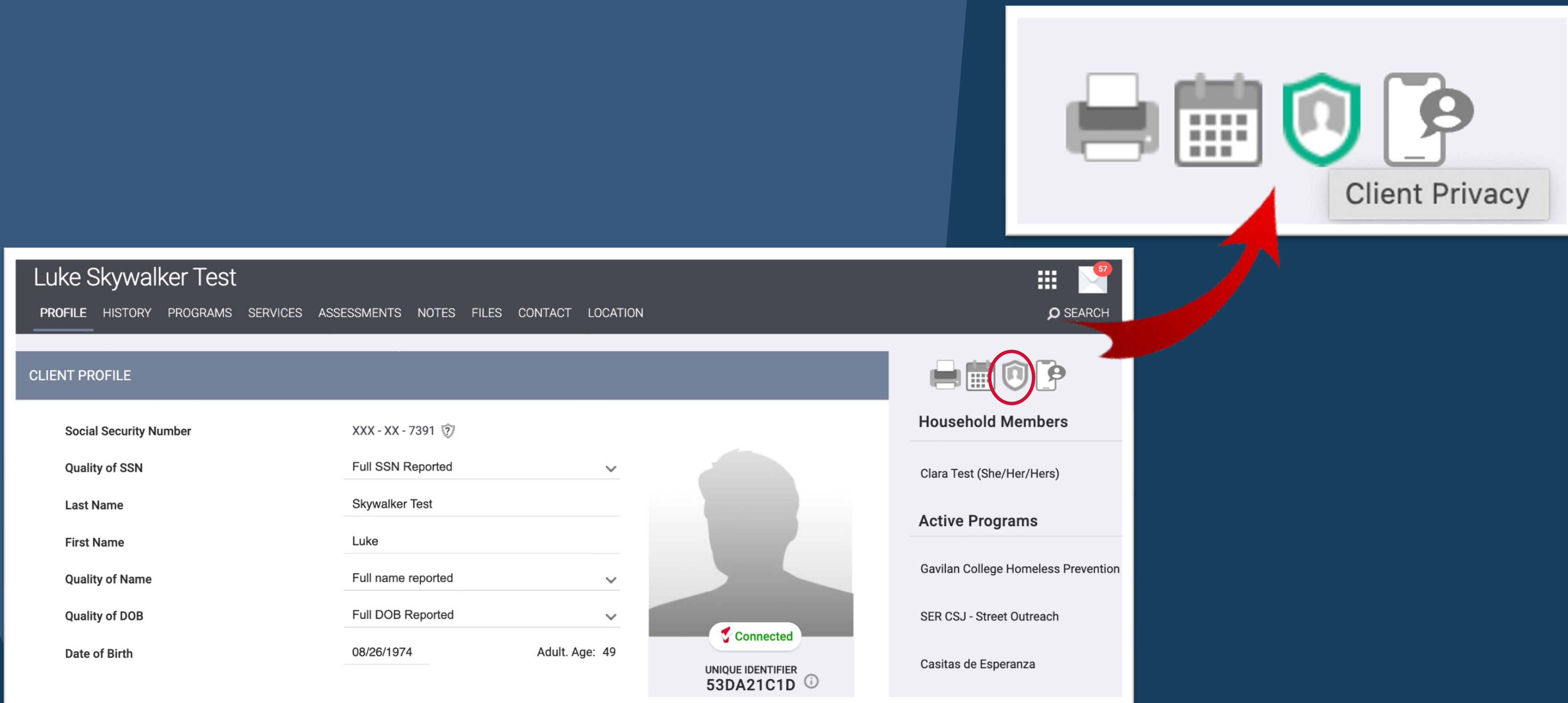
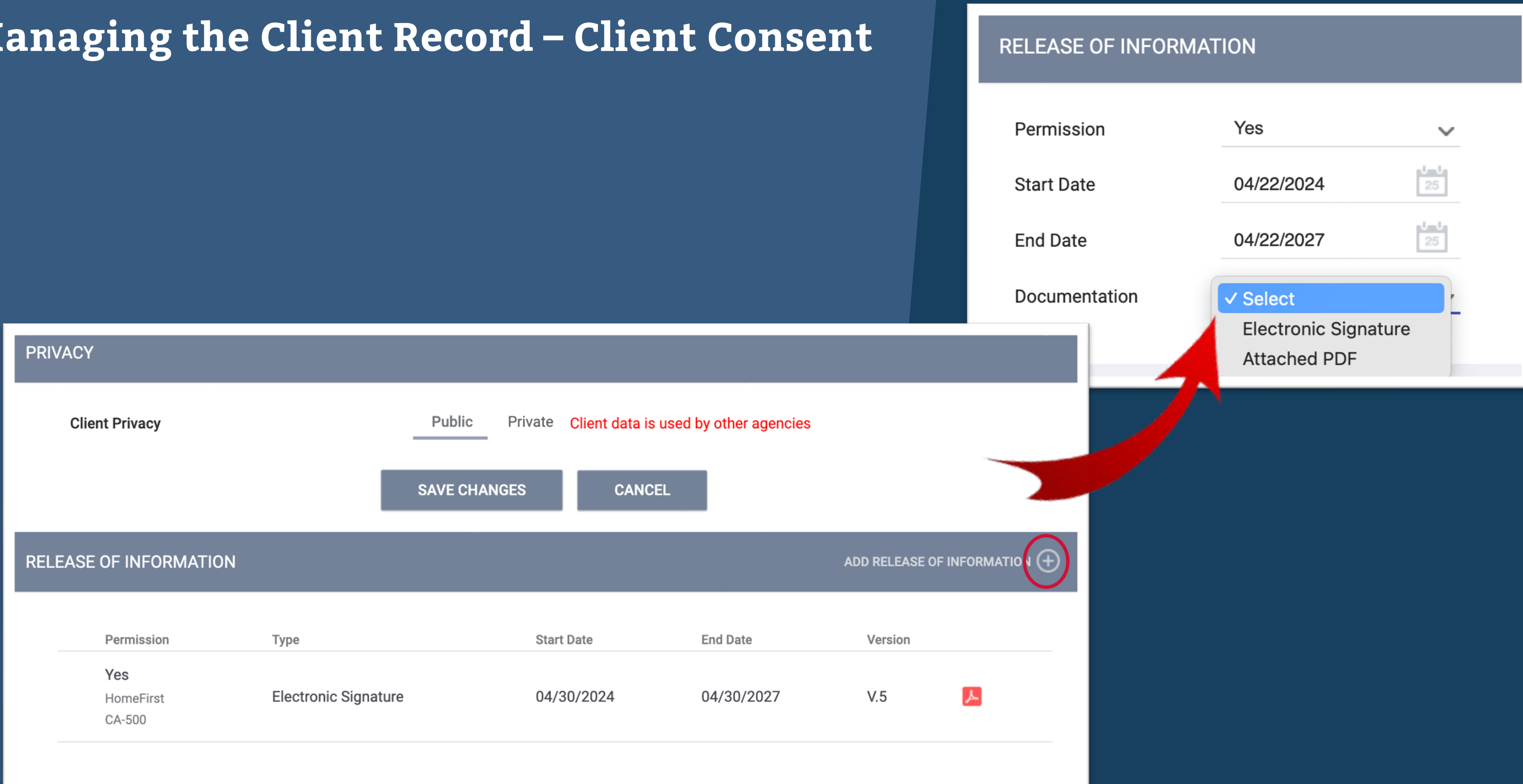
Managing the Client Record – Client Consent



Managing the Client Record – Client Consent


RELEASE OF INFORMATION

Permission: Yes

Start Date: 04/22/2024

End Date: 04/22/2027

Documentation: ✓ Select / Electronic Signature / Attached PDF

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

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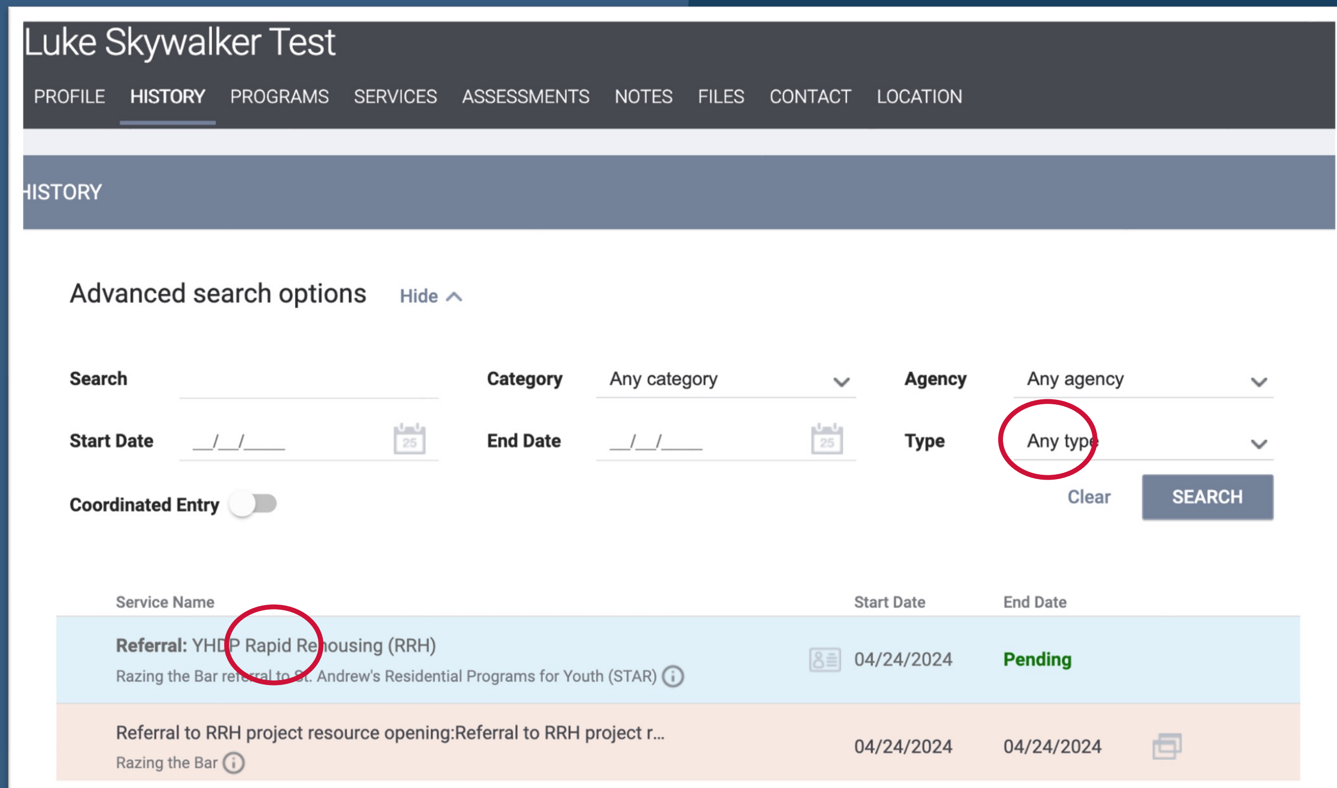
Managing the Client Record

- 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.



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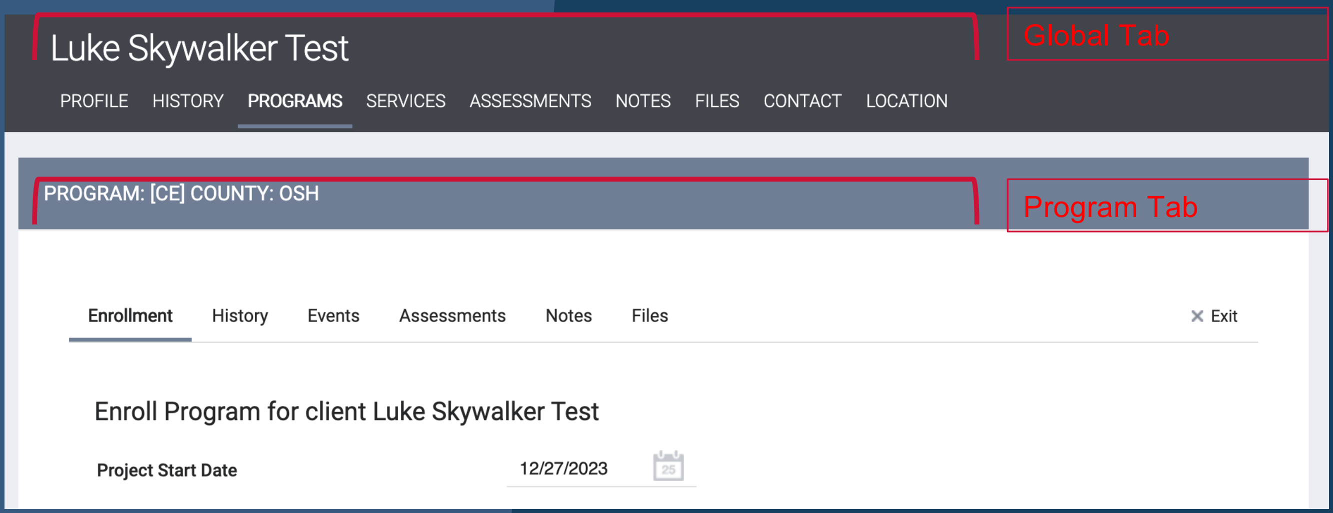
Managing the Client Record

- 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 you agency's program.



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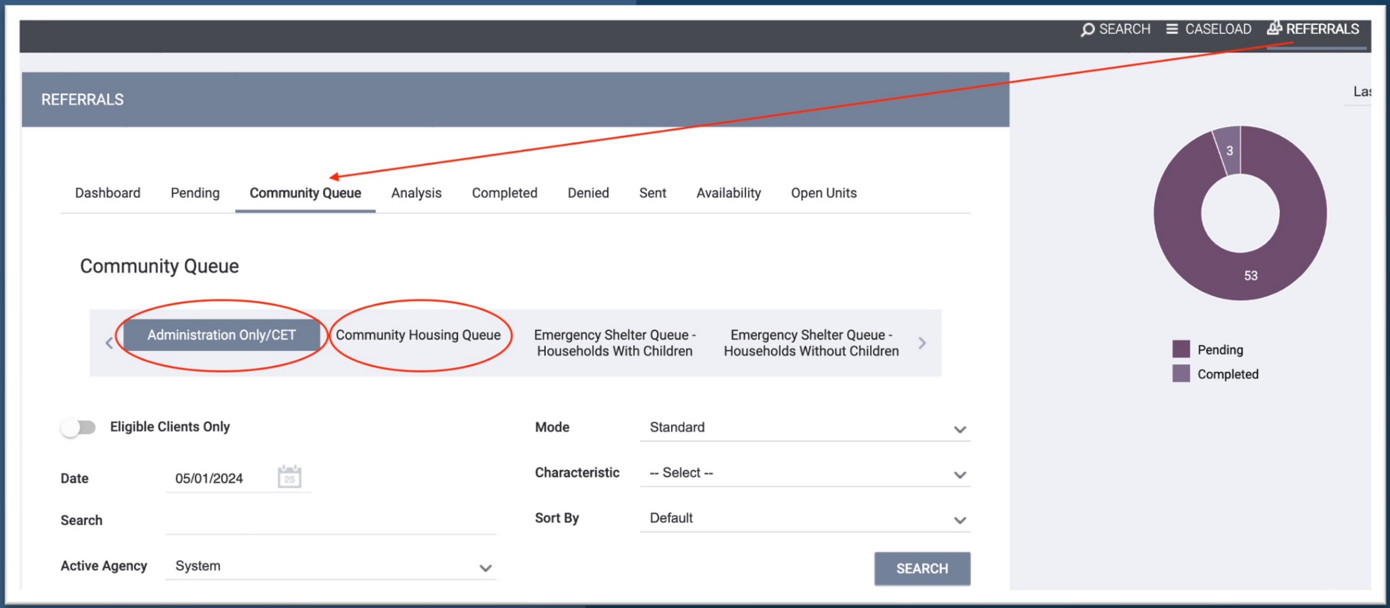
Managing the Client Record

- 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



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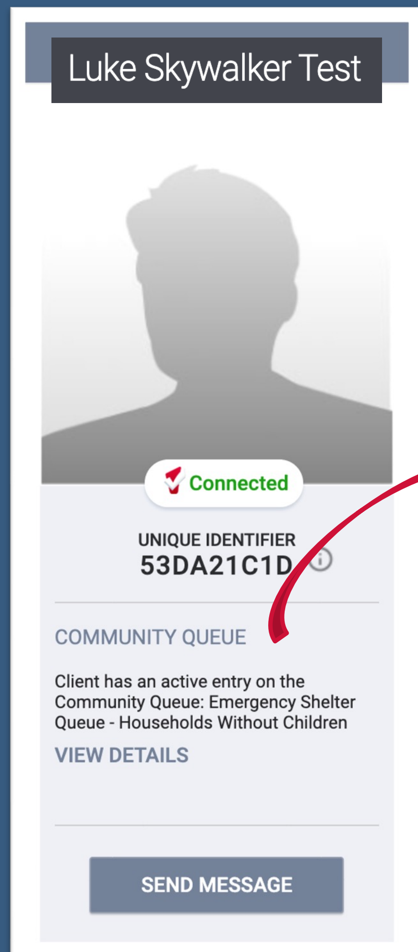
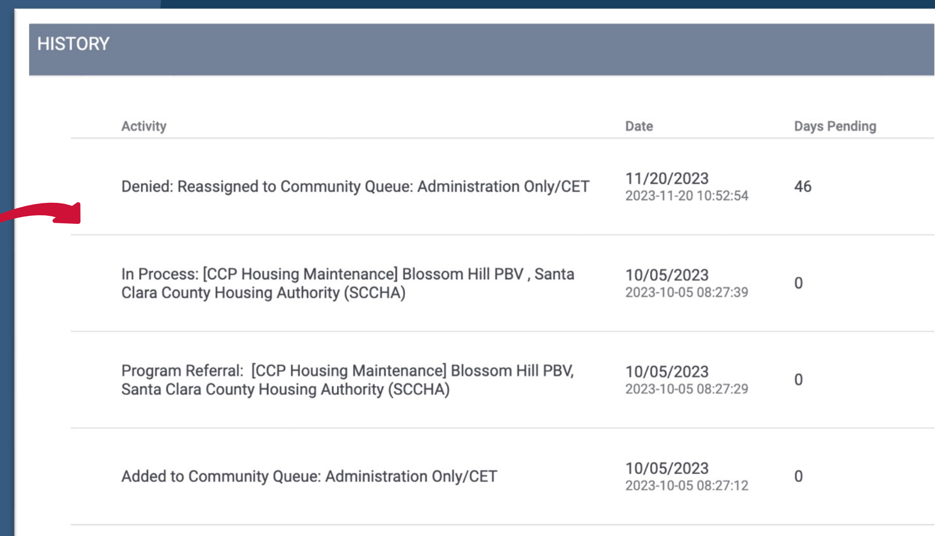
Managing the Client Record

- 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





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

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Reporting: What tools are in Clarity?

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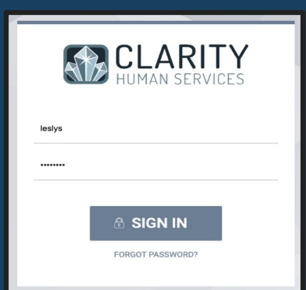
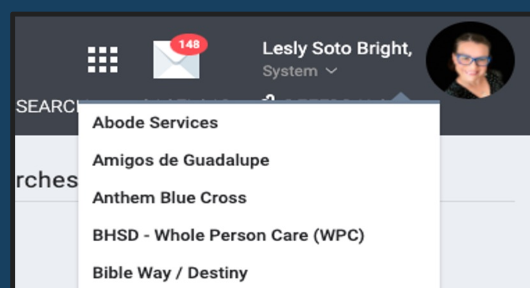
Report Library - Running a Canned Report

⇨Log into HMIS

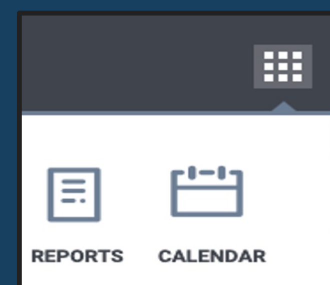


⇨Your Access Role will determine the types of reports you will see

⇨Select the Agency - if multiple access



⇨ Navigate to the Reports



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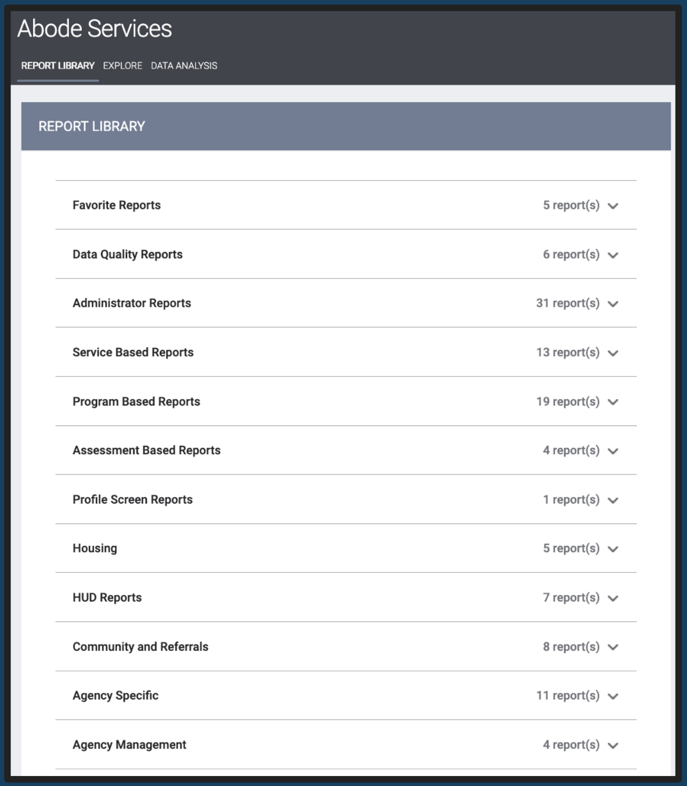
Report Library - Report Anatomy - Library Contents



- 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

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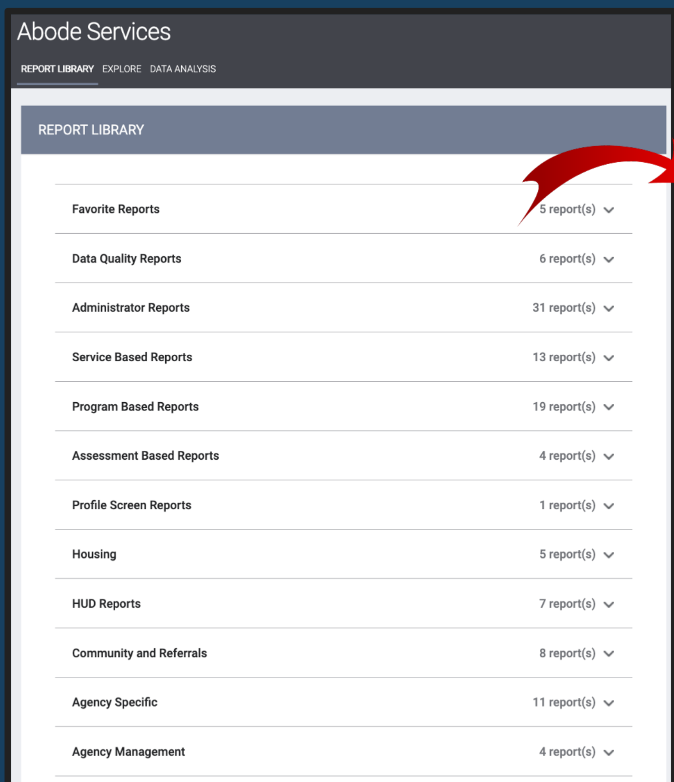
Report Library - Report Anatomy - Types of Reports



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)

Report Library - How To Run Reports

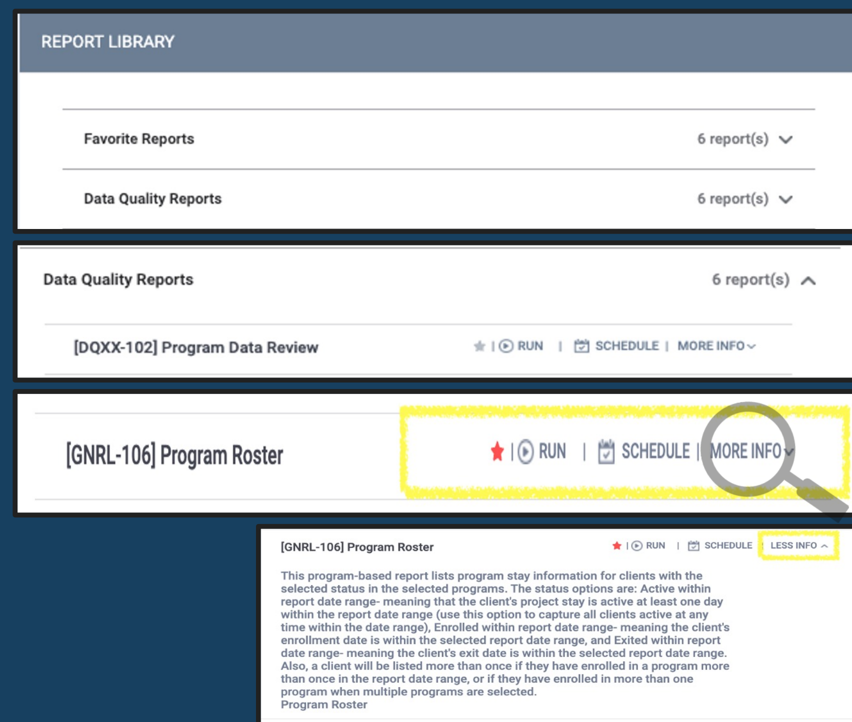
1. Select the report from the report category of choice
2. Use the caret to expand the selection within the category
3. Find the report
4. You will see four options

    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 furth



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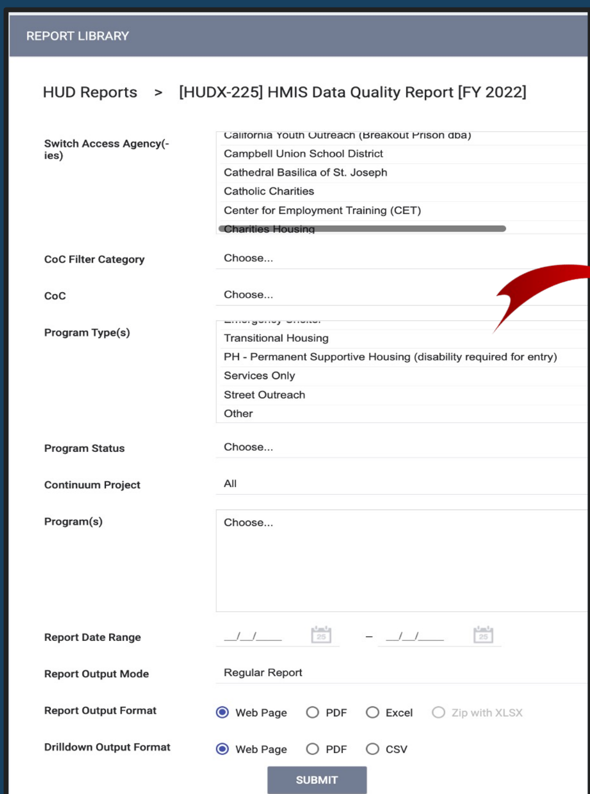
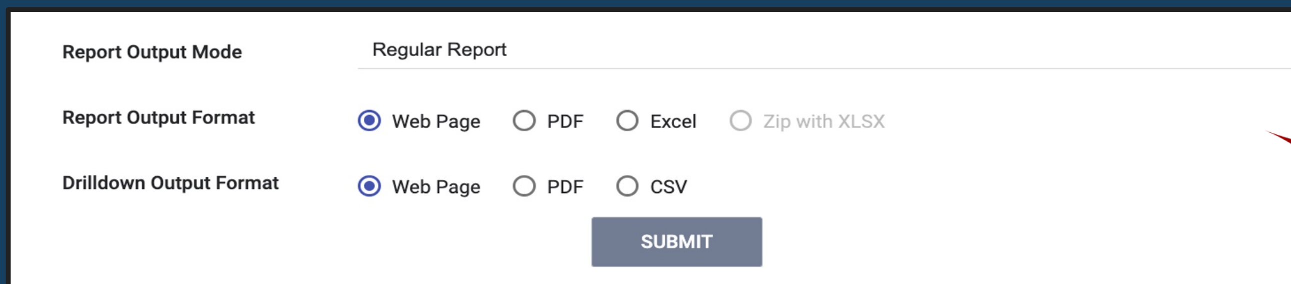
Report Library - Report Anatomy



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

Report Library - Report Anatomy



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	

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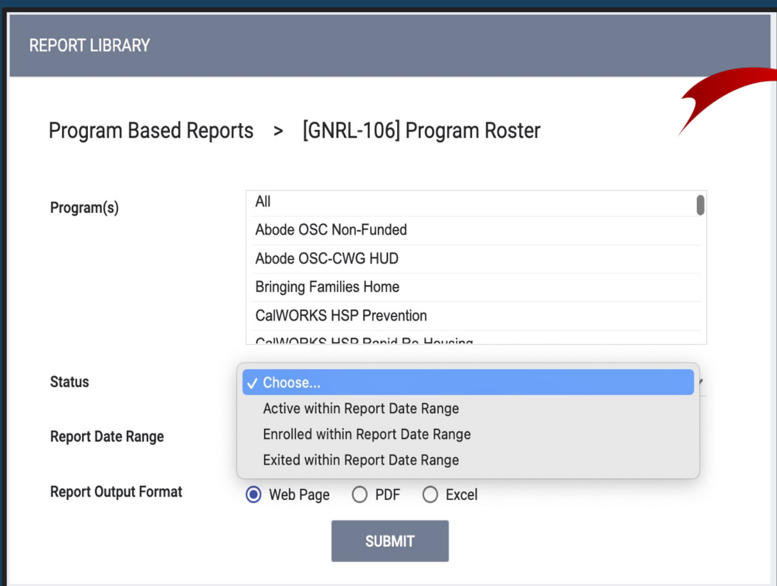
Report Library - Report Anatomy

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



Program(s)	Select the Program you want to run the report for - this will be dependent on access role	
Status	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	
Report Date Range	Enter time frame you want to pull data for - the dates you want the report to pull	
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

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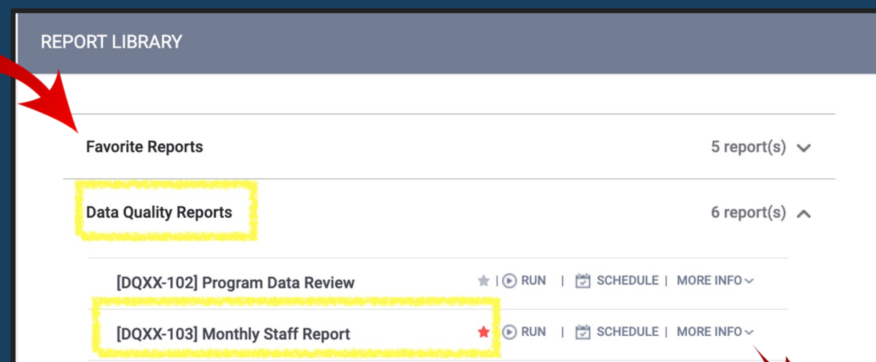
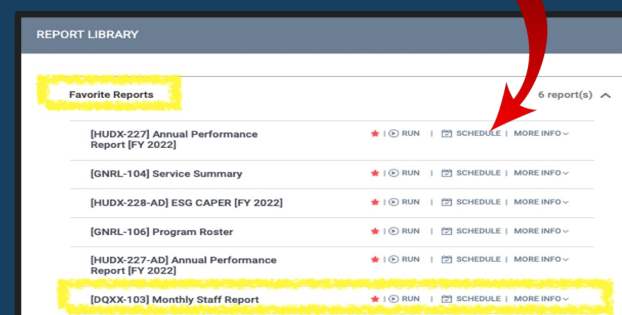
Report Library - Report Anatomy - Favorites

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



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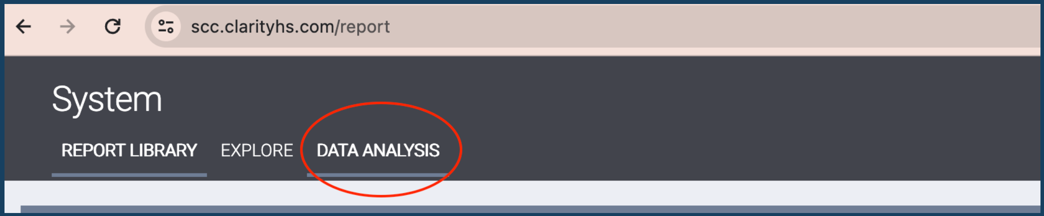
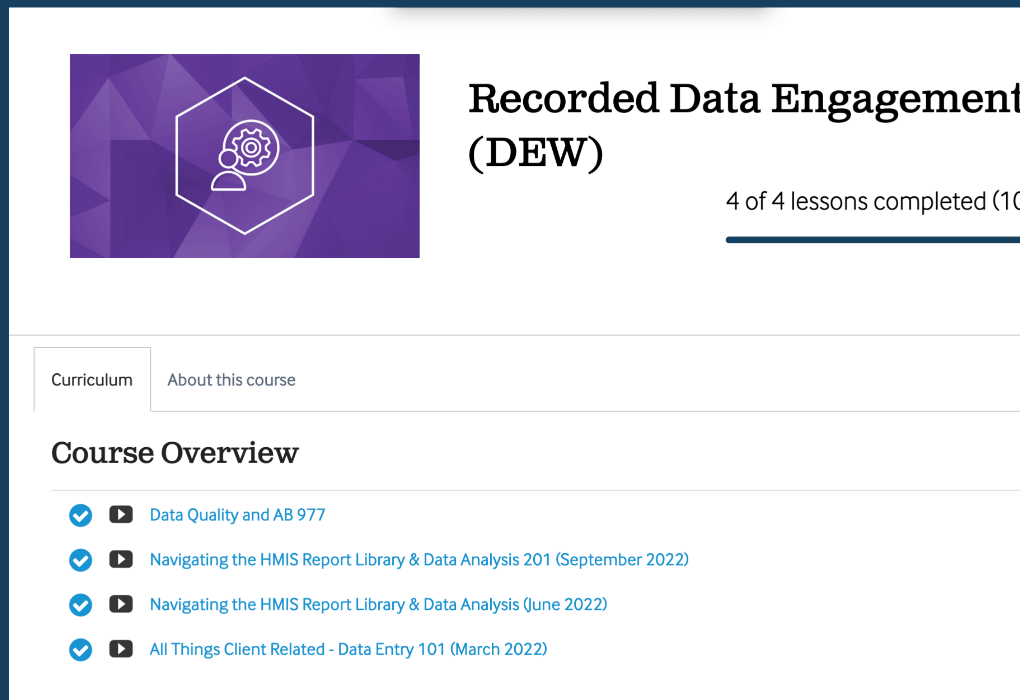
Report Library – Data Analysis tab reports

- ✓ 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 built and save a new Looker-based report



Where can I learn more?



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Scenarios - Hands on Learning

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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)

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Questions, Comments or Concerns?

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Reference Sheet:

Workflow documents, FAQs, and pdf forms, visit the Forms and Manuals page on our website

Training recording website includes a lot of relavant recordings:
Data Engagement Workshop recordings:
>>>>>Canned Reports training
>>>>>Looker Reports training

Report Categories

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Resources

Contact Information	Type of Assistance
SCC-ADMIN@BITFOCUS.COM	*Use this email to contact your sys. admin. team: Angie and Lesly*
SCCSUPPORT@BITFOCUS.COM	*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.*
HELP.BITFOCUS.COM	*Use this to get help on all things HMIS. Type in your question in the search bar and get articles and how to steps.*
SCC.BITFOCUS.COM	*Use this to get insight into all things SCC HMIS related. From New User Training, to Forms and Newsletters and so much more! If you have not already, you should bookmark this page.*

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