

# MyConnectSV Report: How to Guide

## Overview

This guide assists Santa Clara County HMIS Agency Leads verify staff have completed the newly required **MyConnectSV training**.

## Important Access Notes

- **Data Analysis Tab Requirement:** This report is only accessible to users with "Data Analysis" tab permissions.
- **CE and ECM Agencies:** If you are an [CE] or an ECM Agency you will not have DA Tab access. If your agency falls under these scopes, please contact us directly at [scc-admin@Bitfocus.com](mailto:scc-admin@Bitfocus.com) for a list of staff members needing training completion.
- **OSH Staff:** Please note training remains optional for all Office of Supportive Housing (OSH) staff.

## Key Training Dates

- **Launch Day:** Monday, April 13th
- **Halfway Point:** Monday, April 27th
- **Final Day:** Monday, May 11th

In this guide you will find detailed instructions on running the Data Analysis Report: ["MyConnectSV Access Role Check"](#)

## 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](mailto:scc-support@bitfocus.com)) to get their access role changed

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## Running the Report in the Data Analysis Tab

A) Login into HMIS

H) Click on "Run" next to the report "MyConnectSV Access Role Check."

B) Ensure you are in the correct Agency (this is under your name/photo)

I) Enter your agency name into the box labeled: "Agency Filter"

C) From the Launchpad/Rubik's cube, select the REPORT module

J) Run the report by clicking the update button in the top right-hand

D) Once the new page has populated, you will see 3 tabs: Reports Library, Explore, and Data Analysis

K) This will generate a list of all end users. Those with access role "+portal" have completed the training.

E) Navigate to the Data Analysis tab

F) Select the Santa Clara County HMIS Reports, click the drop-down arrow

G) You will see several reports listed; scroll down to the Data Quality section and select the "MyConnectSV Access Role Check."

