MyConnectSV:

Santa Clara County HMIS
Customer Portal

Provider Training

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Agenda

- About **MyConnect**SV
- Participant-Facing Functionality
  - Feature Overview
- Provider Functionality
  - Sending Invites
  - Sending Requests
  - Using Features
- Participant Support Process
- Provider Resources

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About MyConnectSV

MyConnectSV is the Santa Clara County HMIS Customer Portal

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MyConnectSV Development Process

Tech Needs Assessment

Concept for **MyConnect**SV was a result of the *Santa Clara County Supportive Housing System Tech Needs Assessment*

Collaborative Development

Developed by Bitfocus in collaboration with Lived Experience Advisory Board, Destination: Home, and the County of Santa Clara Office of Supportive Housing

Lived Expertise

The project team consulted with individuals with lived experience through the development & design process

Elevating Access

Designed to elevate access and agency for program participants

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Provider Expectations

Review Training and Support Materials

Review training materials provided

Provide Support to Participants

Help participants get connected & refer them to additional information and support

Send MyConnectSV Invitations Through HMIS

Invite participants through Clarity

Utilize MyConnectSV Features

Use in your case management process!

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Support Participants

Direct Participants to Resources

Help Create an Account

Help Escalate Any Technical Issues

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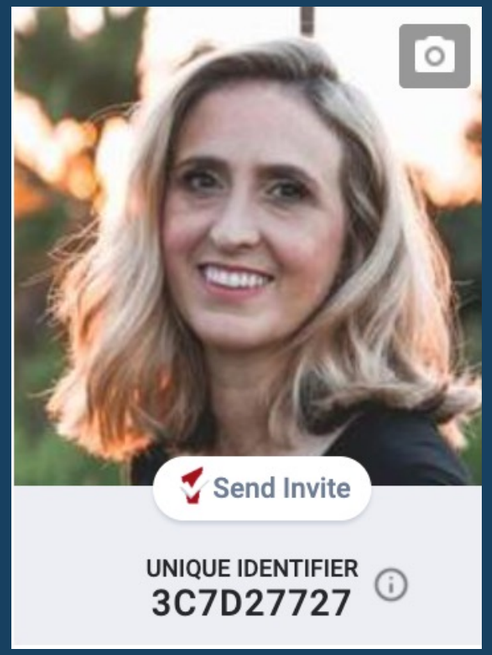
Invite Participants

Extend Invitations through HMIS

Invite All New Participants to Join

Invite as Many Existing Participants as Possible

Share Your Excitement with Participants



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Utilize Features

Send and Respond to Messages

Send Document, Location, and ROI Requests

Save Valuable Time

Use the Clarity Calendar for Appointments

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Feature Review: Participant-Facing Functionality

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What Do Participants Need to Participate?

Personal Email Account

Access to a Personal or Shared Device

Internet Connection

Invitation from Service Provider

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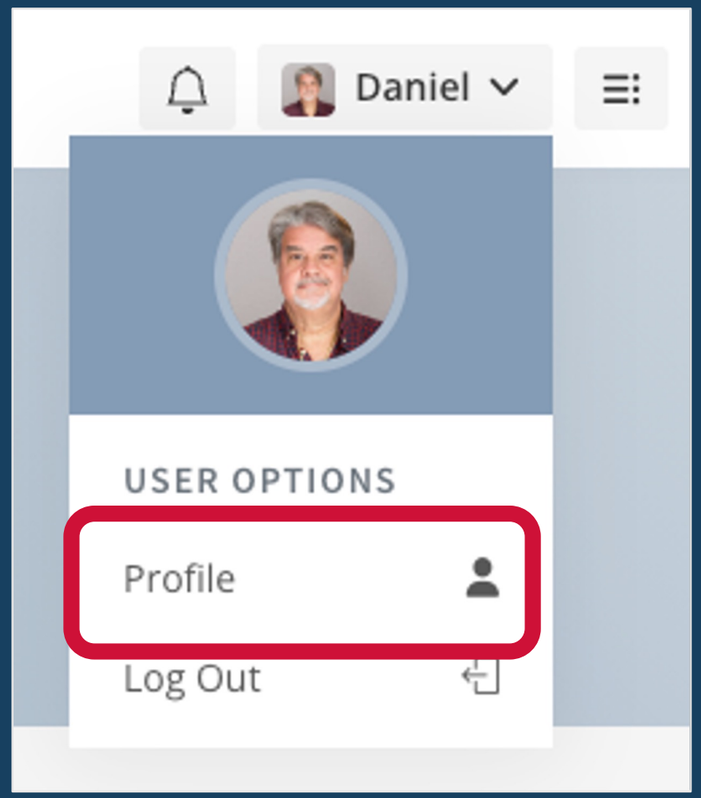

Profile

Functionality Overview

- Account settings & preferences
- Upload a new profile photo for approval
- Ability to disconnect account

Recommendations

- Encourage participants to review and set their account preferences at account creation
- Encourage participants without profile photos to upload one

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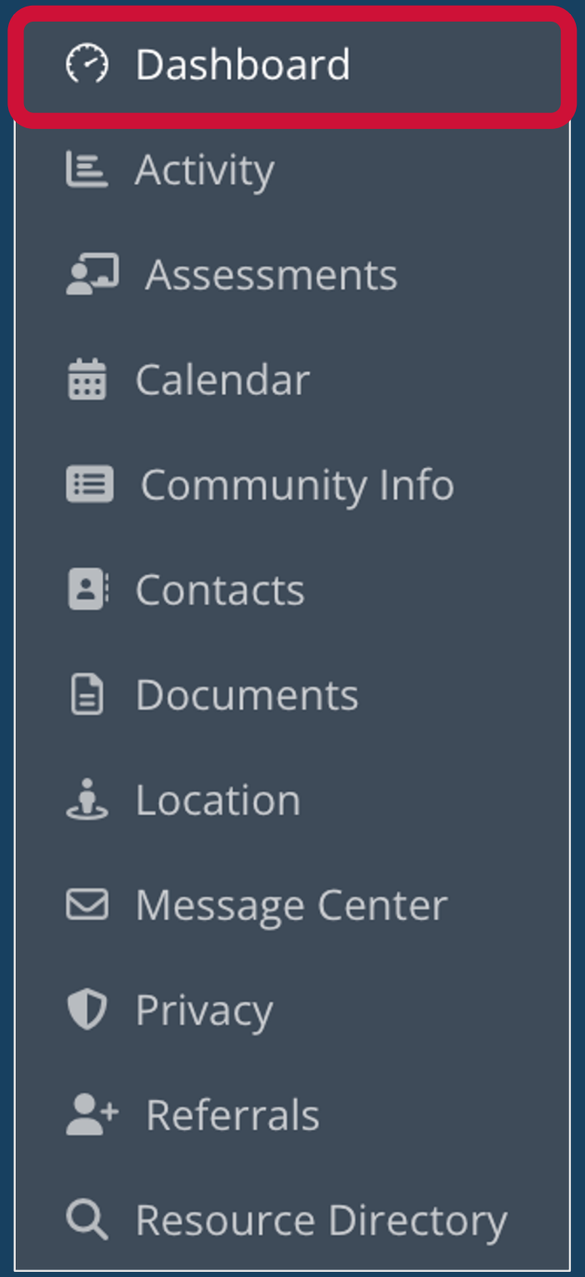

Dashboard

Functionality Overview

- Home screen at login
- Shows Household members, Care Team members *(including Agency and Program name)*, Community Queue status, and upcoming appointments

Recommendations

- Encourage participants to review their household members & care team assignments
- Participants can click on a Care Team member's name to easily send a new message

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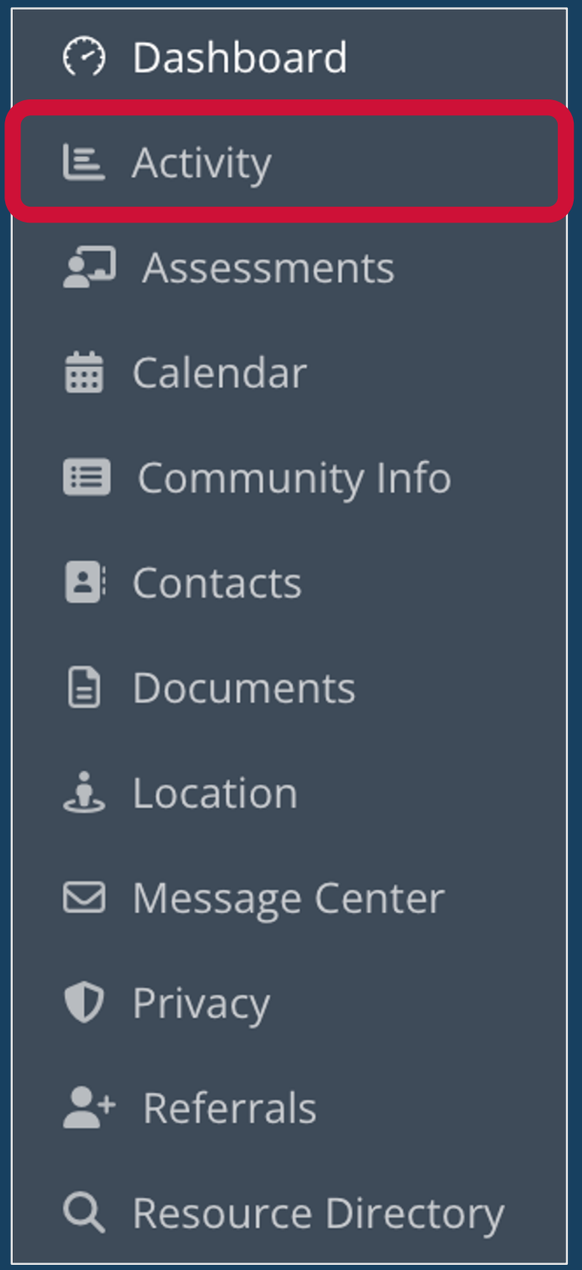

Activity

Functionality Overview

- Listing of program enrollments and participation dates
- Participants won’t see details of program records (such as case notes or screen details)

Recommendations

- Encourage participants to review their program enrollment history

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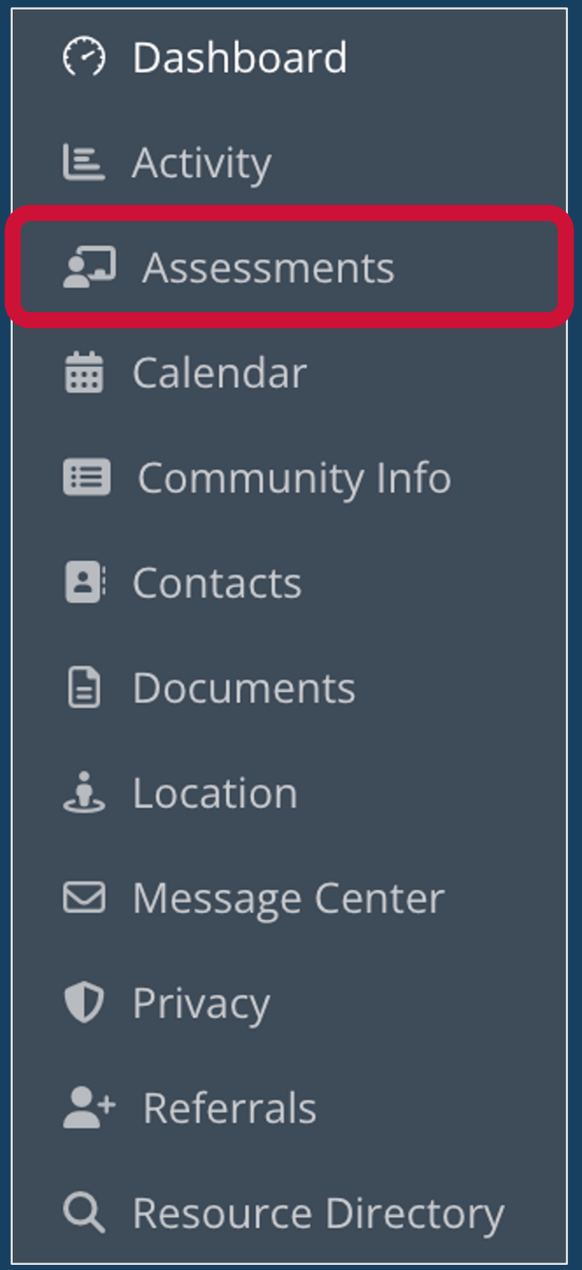

Assessments

Functionality Overview

- Complete assessments requested by a provider through HMIS
- Only approved assessments can be requested
- Review previously submitted assessments *(no access to scoring or eligibility determinations)*

Recommendations

- Explain to participants they will be receiving an assessment before submitting request
- Explain to participants they can request an in-person assessment
- Encourage participants to respond to requests as soon as possible

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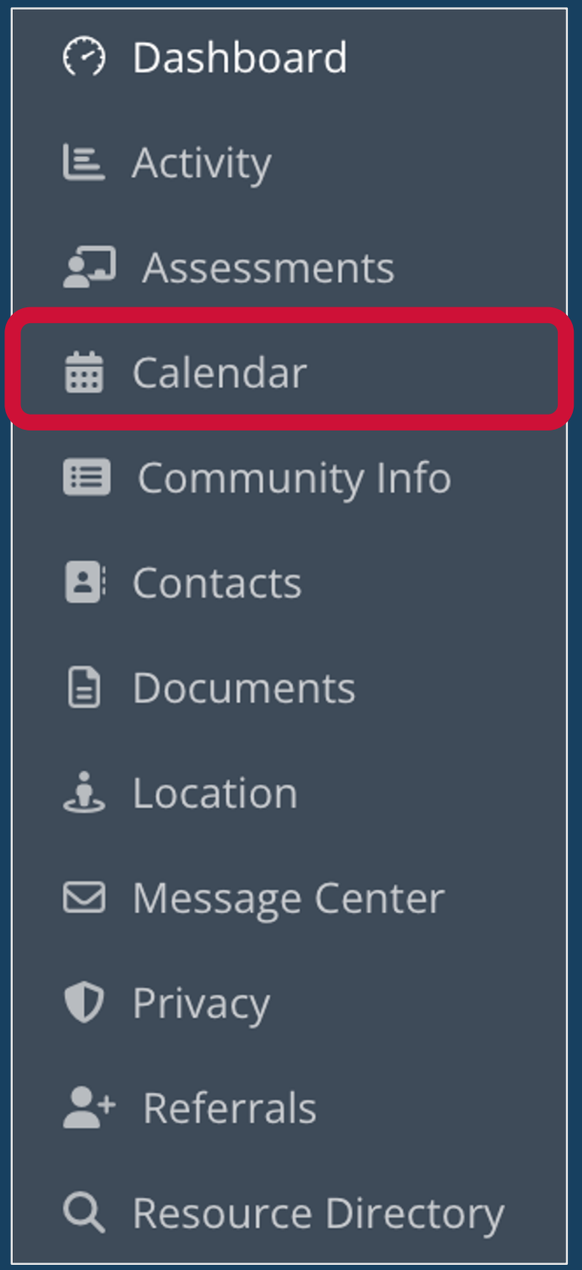

Calendar

Functionality Overview

- Schedule appointments with care team members based on their posted available time slots
- View any appointments scheduled through Clarity

Recommendations

- Post appointment slots so your participants can easily schedule time to meet with you
- Encourage participants to use the appointment scheduling feature to find a time to meet with you or cancel upcoming appointments

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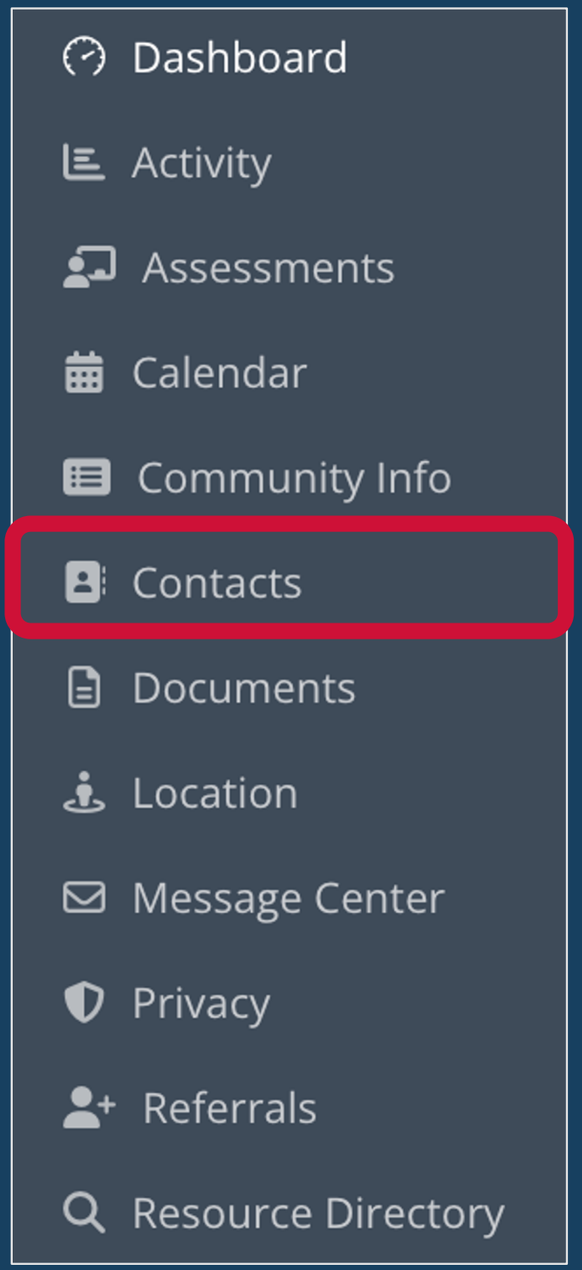

Contacts

Functionality Overview

- View and update Contact records from Clarity
- Add new Contact records

Recommendations

- Explain to participants why it's important to keep their contact information up-to-date
- Provide examples of additional people they may want to provide contact information for, such as emergency contacts or close family members

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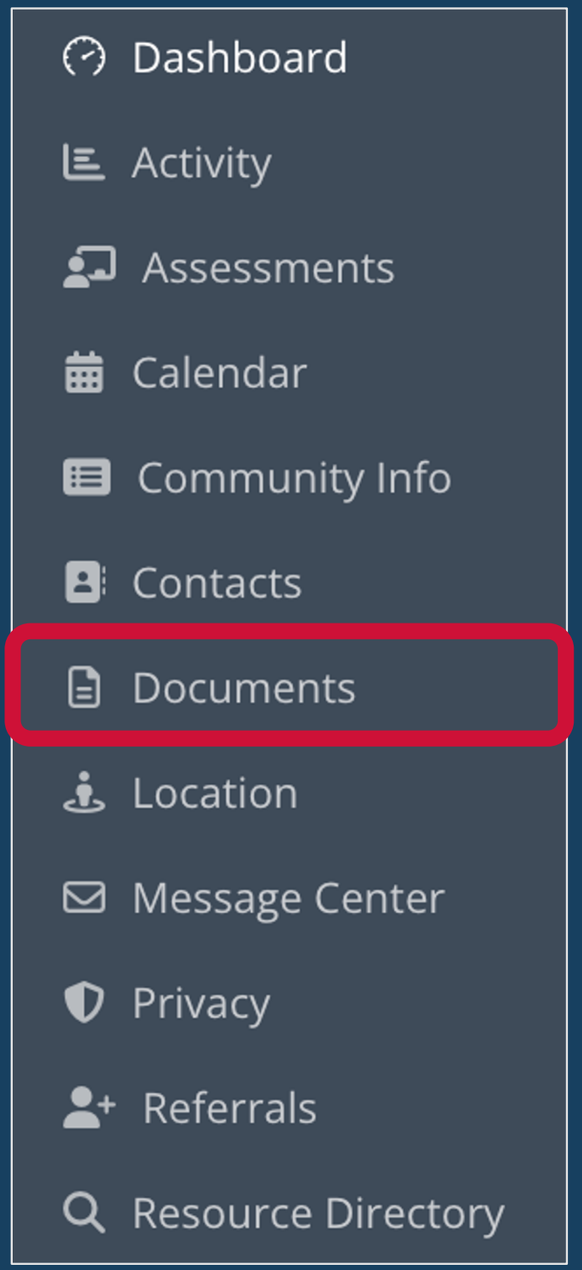

Documents

Functionality Overview

- Upload key documents at any time *(pictures, screenshots, or PDFs)*
- Providers can request specific documents from participants
- Review previously submitted documents

Recommendations

- Explain which documents may be useful for participants to submit
- Explain that submitted documents are safely and securely stored
- Explain to participants once a document is uploaded, they cannot modify or edit it through the Portal

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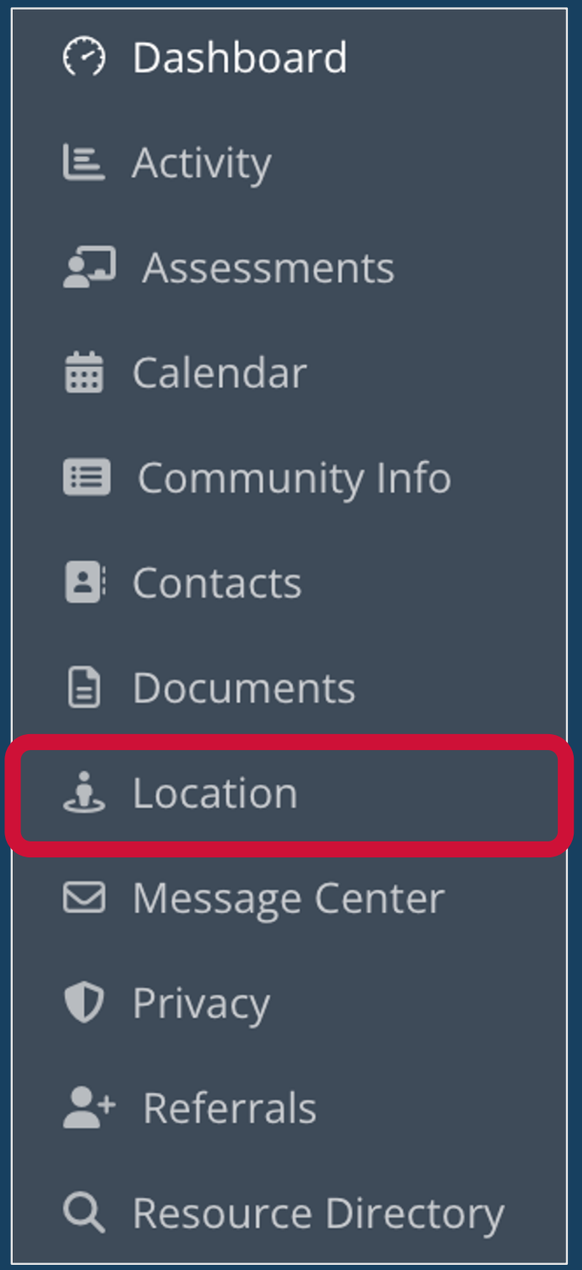

Location

Functionality Overview

- Share a location at any time (address, map pin, or GPS)
- Providers can request location updates
- Can add a location name, photos, and notes to provide additional info about the location they're choosing to share

Recommendations

- Emphasize to participants that location requests help with providing services and ***will not be used for tracking purposes***
- Encourage participants to add notes and photos to provide additional context to providers, and to mark locations as "Inactive" if they're no longer there

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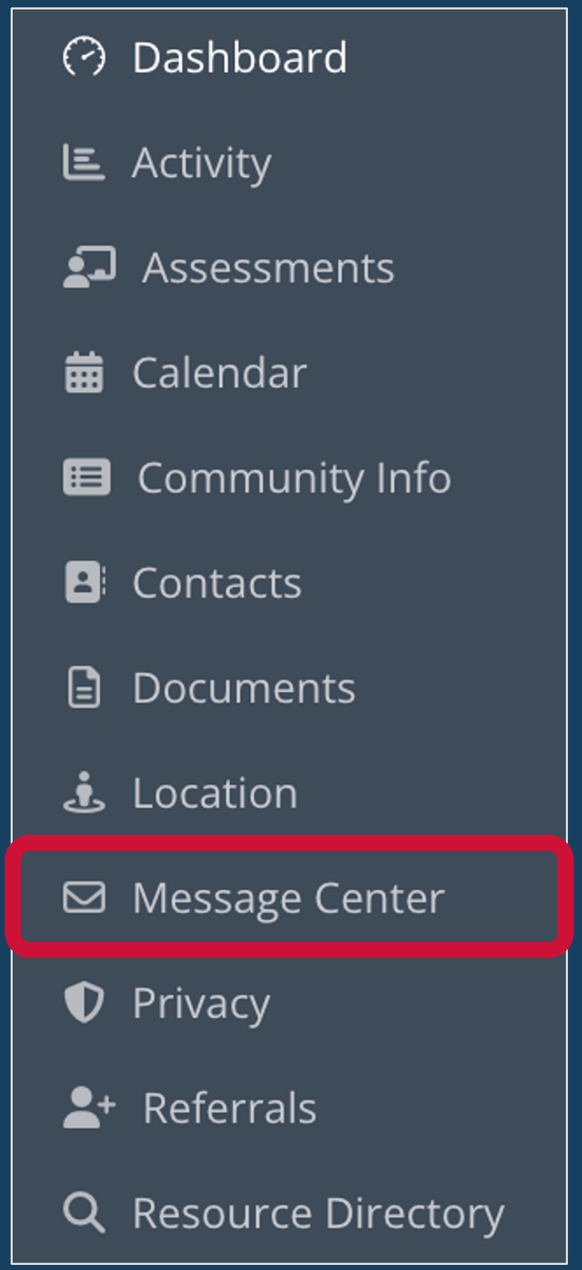

Message Center

Functionality Overview

- Send and receive messages with care team members
- Review previous messages and responses

Recommendations

- Explain to participants they can turn off messaging in their profile if desired
- Encourage participants to use the Message Center to request updates or information

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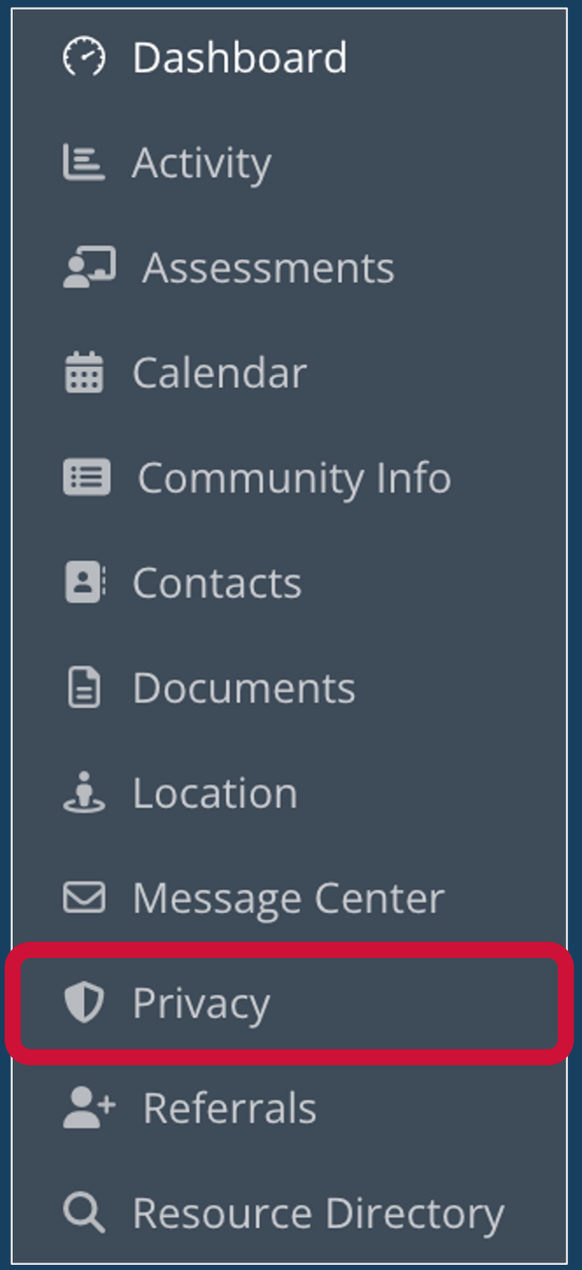

Privacy (ROIs)

Functionality Overview

- Electronically sign a new Release of Information at any time if previous ROI is missing or expired
- Providers can request a new ROI

Recommendations

- Explain to participants the importance of ROIs for coordinating services
- Explain to participants that they cannot revise or revoke an ROI within the Portal, but they can send a message to make a request

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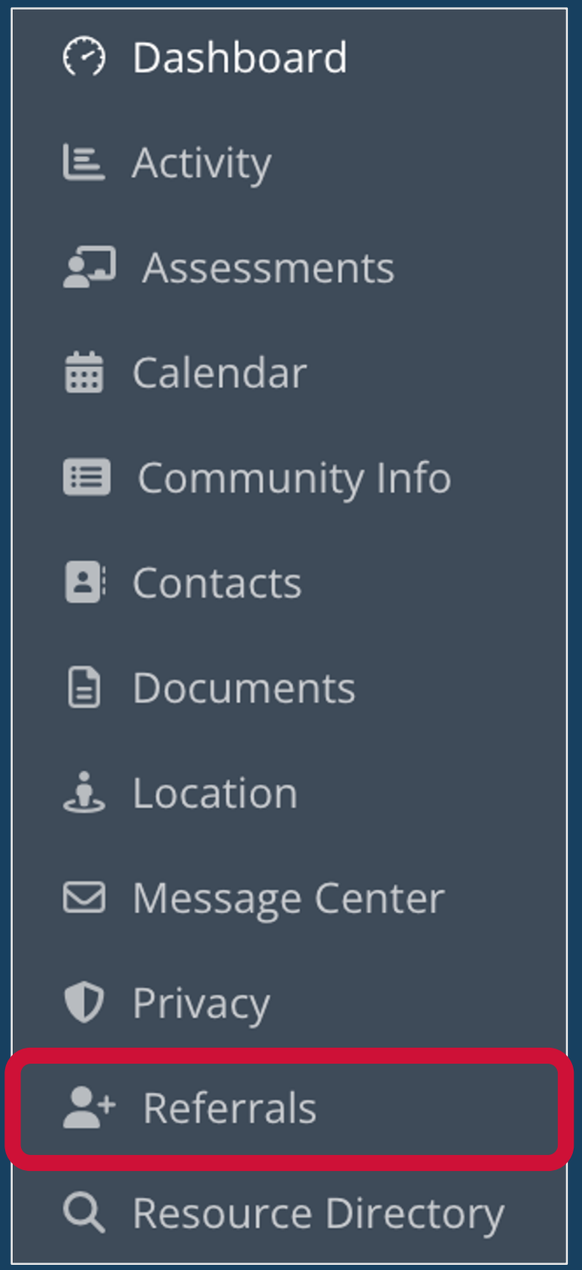

Referrals

Functionality Overview

- Listing of current and past program referrals
- Participants won't see referral notes

Recommendations

- Encourage participants to review their program referral history
- Encourage participants to reach out to you or another member of their Care Team right away when they are notified of a pending program referral

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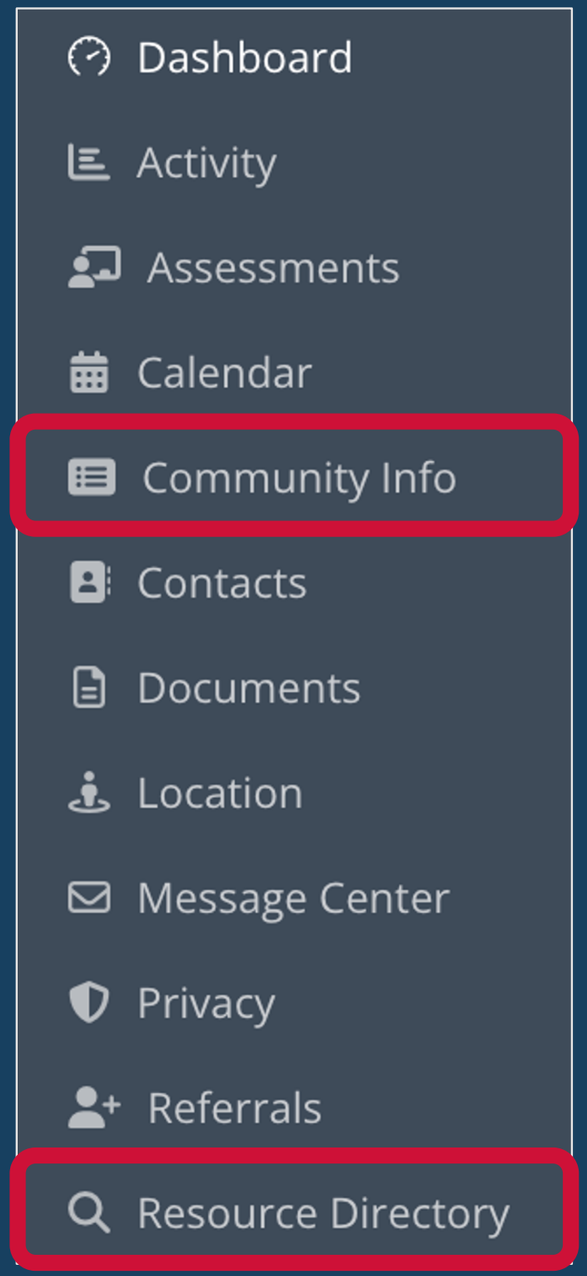

Resource Directory & Community Info

Functionality Overview

- Allows participants to get up-to-date local information
- View and filter resources by agency, category, and location
- Use a map with current location to identify nearby resources

Recommendations

- Explain to participants that resources and articles should be reviewed often to stay up-to-date
- Explain to participants that they can see the “Last Updated” date for each resource or article to identify new and updated information

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Participant Functionality

Demo

Provider Functionality & Workflows

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MyConnectSV Invitations

Verify Eligibility

- 18 years of age or older
- Consent to participate
- Active Release of Information (ROI)
- Profile is not de-identified

Verify Identity

- Confirm Full Name
- Confirm two identifying pieces of information:
  - DOB
  - Phone Number
  - Address
  - SSN
  - Recent Service History
  - Photo
  - HMIS ID Number

Send Invitation

- Send Invite through participant HMIS profile
- Invitations must be responded to within 14 days
- Participants will receive reminders if their invitation is going to expire
- Manually resend invitation at any time

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Points to Emphasize with Participants

Designed to Increase Access
New tools designed to give more control and access to their own data and information

Developed in Collaboration
Developed in collaboration with individuals with lived experience of homelessness.

Secure Connection
Developed with the security of individuals and their personal information in mind.

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Restrictions

DO NOT use **MyConnect**SV to share the following information:

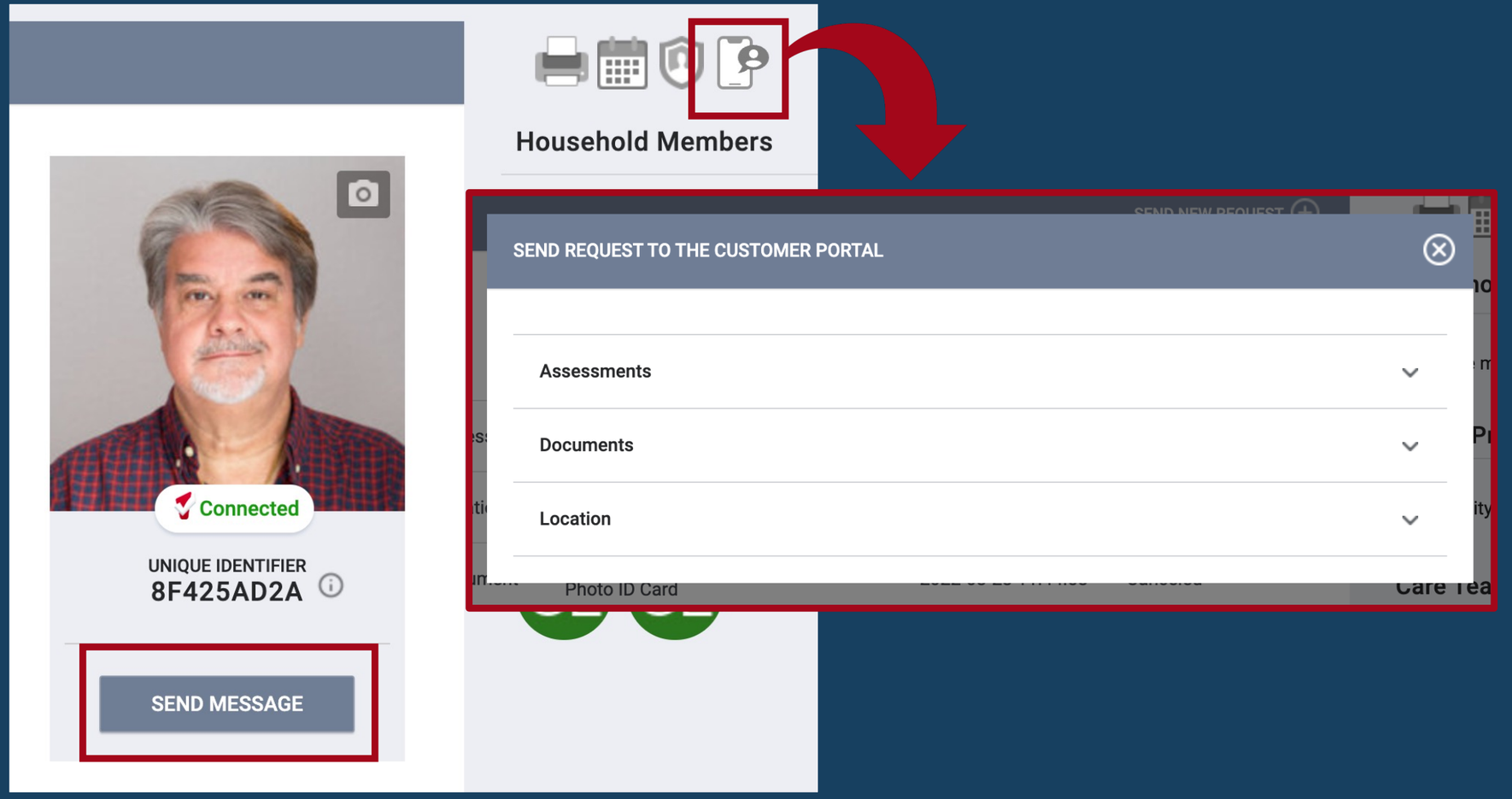
- 🚫 Health Care Information or Health Status (HIPAA)
- 🚫 Alcohol & Drug Abuse Treatment Information
- 🚫 Domestic Violence Status or Program Information
- 🚫 Citizen, Residency, or Immigration Status
- 🚫 Financial Accounts or Credit Scores
- 🚫 Education Records

Invitation

Demo

Sending Requests and Messages

Send **individual** requests or messages to a participant's **MyConnect**SV account through their Clarity profile



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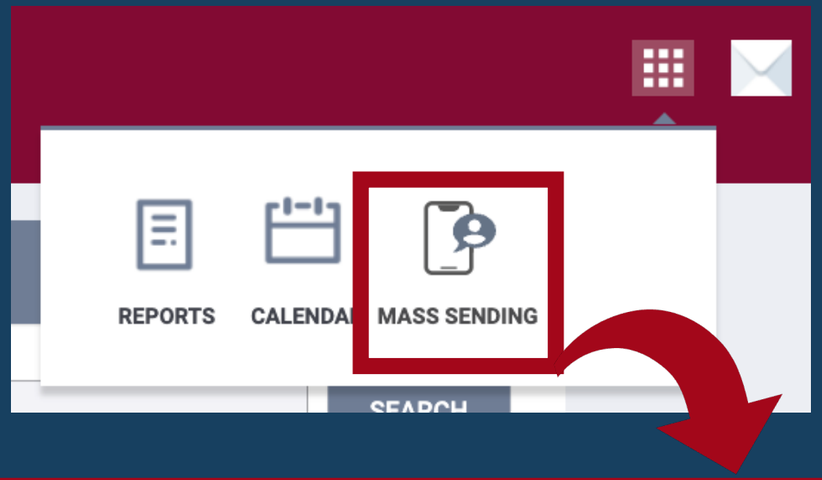
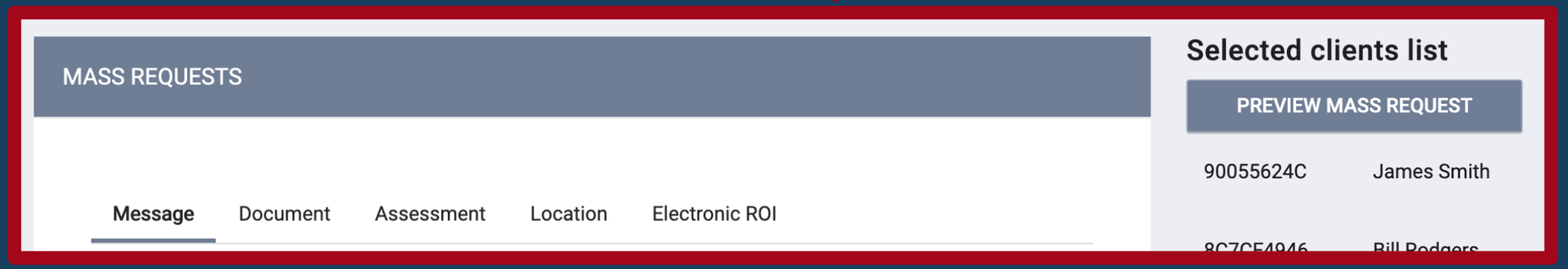
Sending Requests and Messages

Send requests or messages to **multiple** participants at one time using the **Mass Sending** functionality





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Sending Requests

Demo

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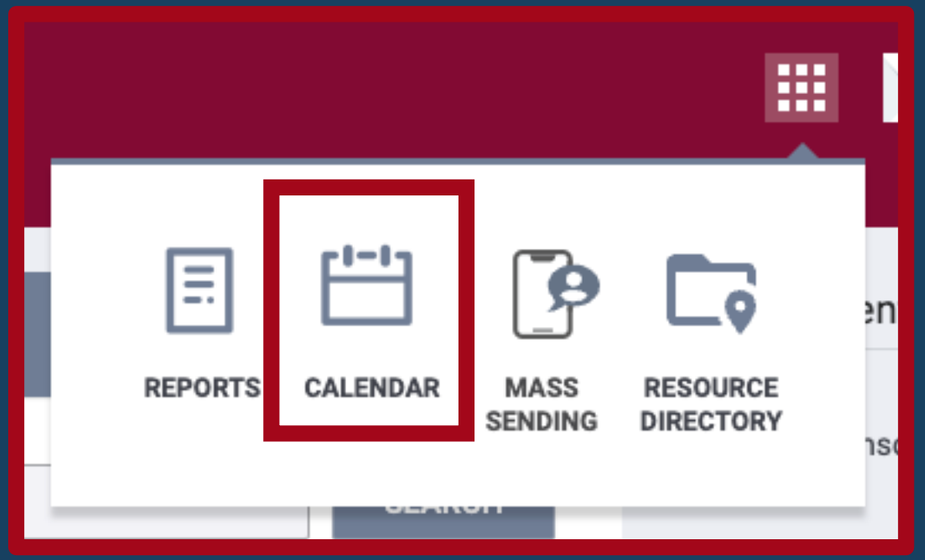
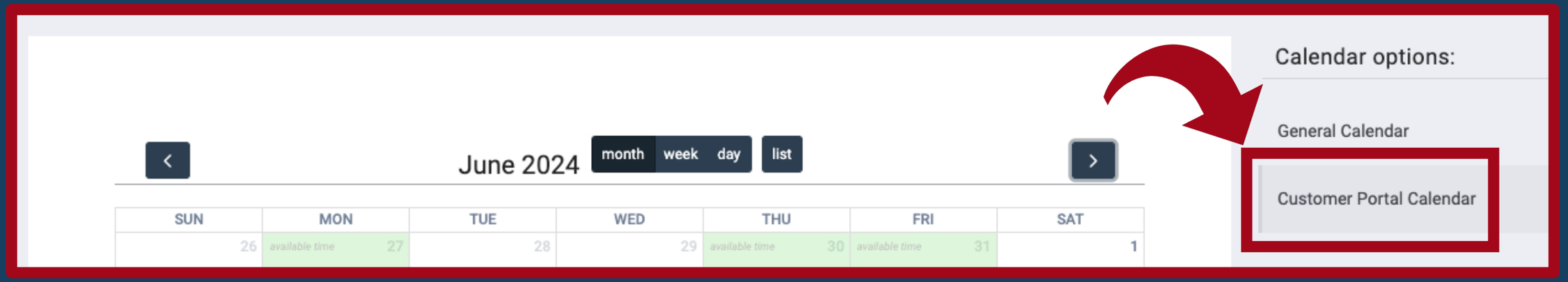
Posting Appointment Slots

Post times you're available to meet as **appointment slots** so that participants can schedule time with you directly through MyConnectSV





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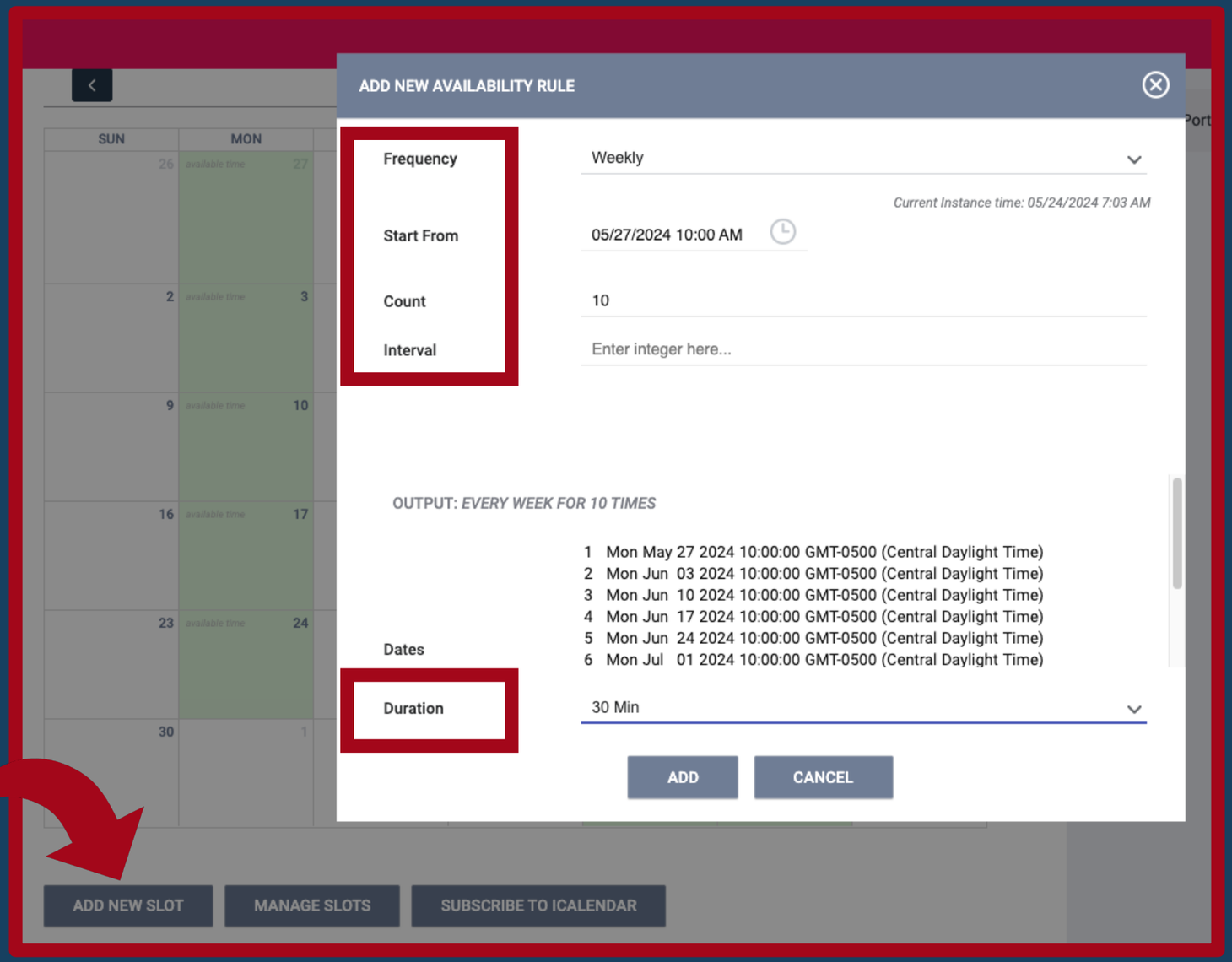
Posting Appointment Slots

Click “Add New Slot” and choose:

- Frequency
- Starting date and time
- End date *or* count of slots to schedule
- Interval *(optional)*
- Duration



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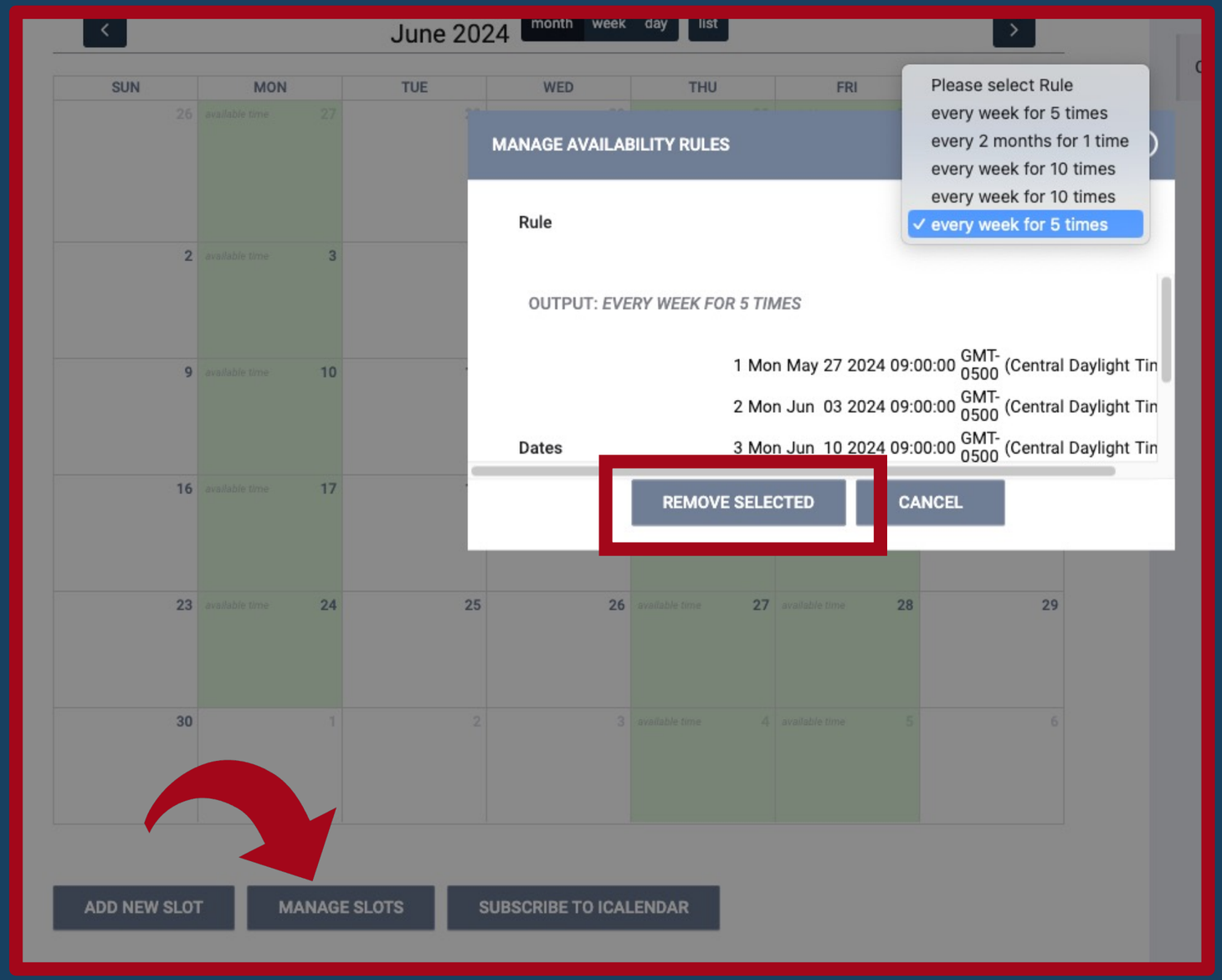
Posting Appointment Slots

Click “Manage Slots” to remove an existing recurring schedule of appointment slots



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Posting Appointment Slots

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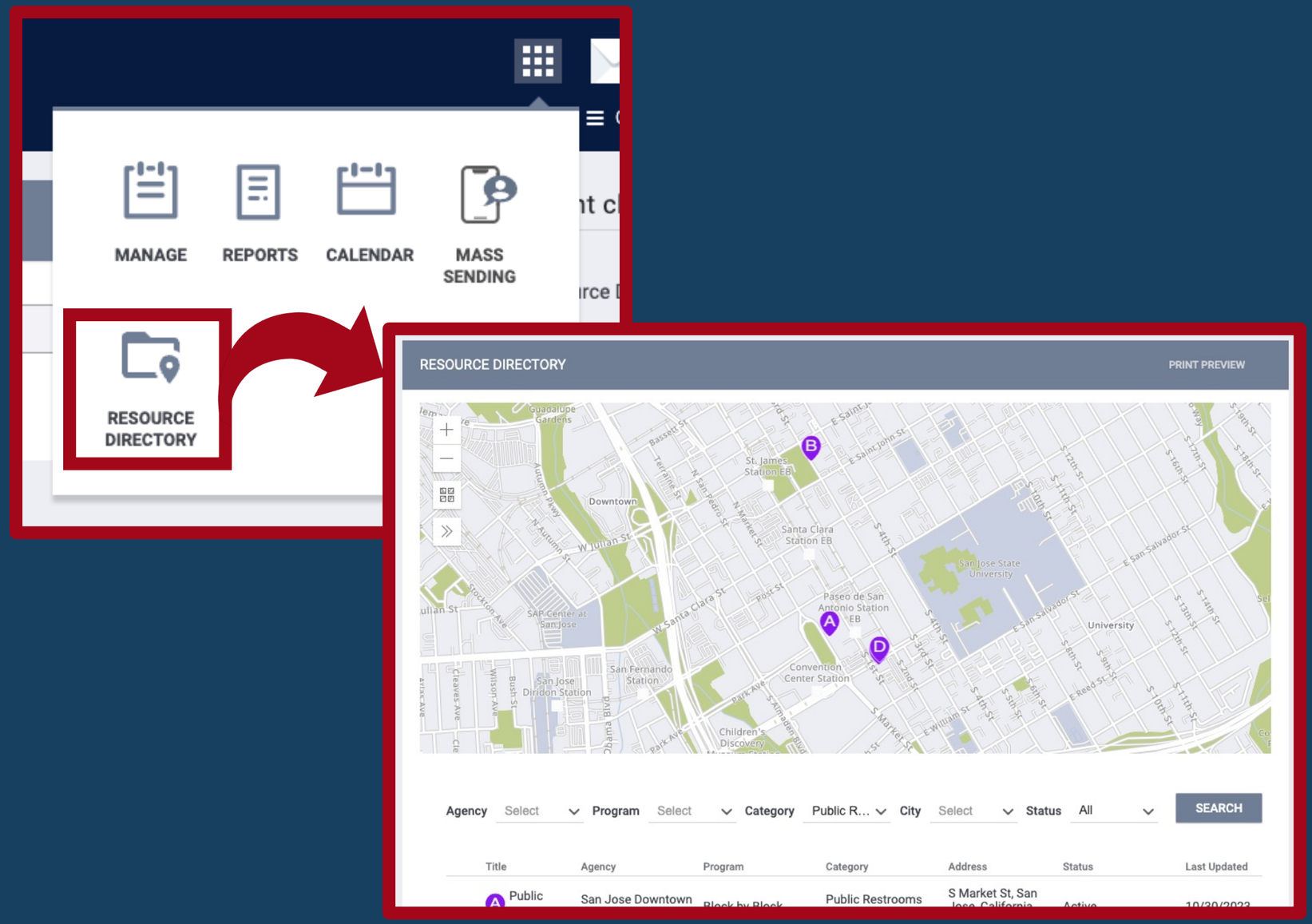
Resource Directory

View and filter the same MyConnectSV resources within Clarity and print them to share with participants



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Resource Directory

Demo

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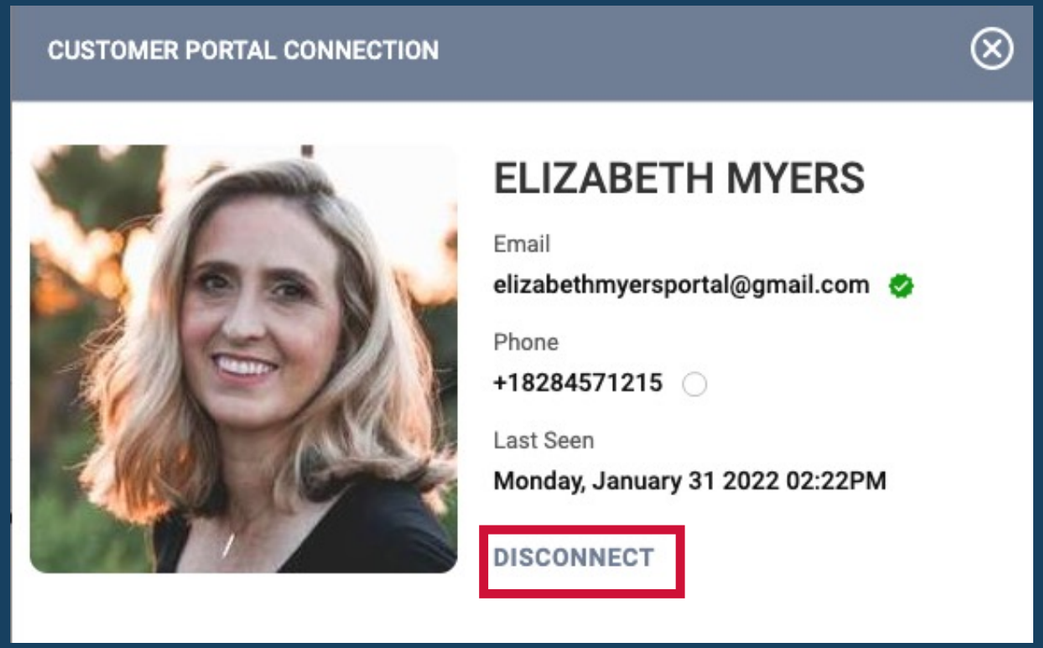
Account Disconnection

Participants or their providers should disconnect an account immediately if any of the following occur:

- Participant places request for their Clarity profile to be de-identified
- Participant lost access to personal email
- Participant's personal email is compromised
- Participant has changed their personal email address

*Account disconnection suspends access to a participant's personal information within **MyConnect**SV.*

*If a participant has only forgotten their **MyConnect**SV password and their email has **not** been compromised, they can use the "Forget Password" button on the login page to receive a link to reset their password.*



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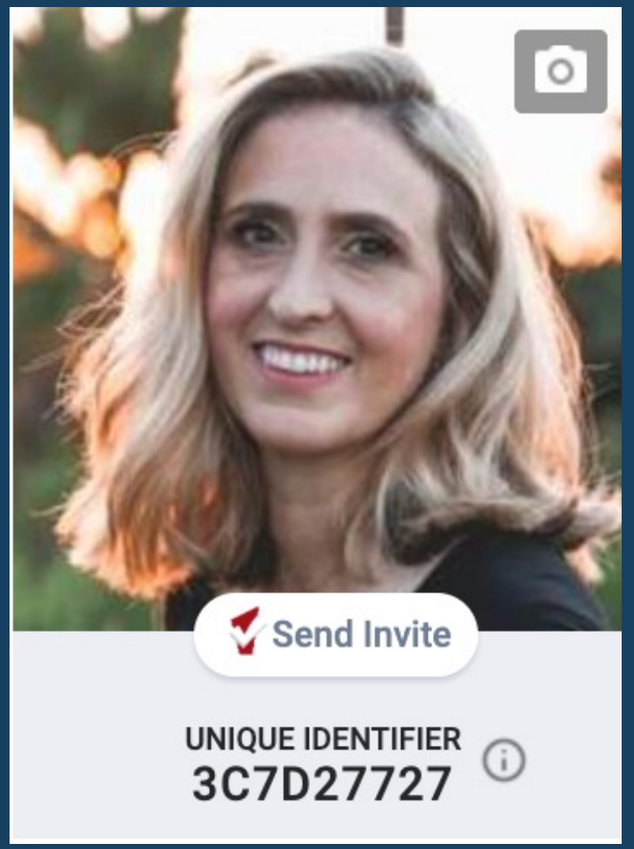
Account Reconnection

If an account has been disconnected due to a participant losing access to their email account:

- Encourage participant to create a new free email address
- Send an invite to a participant's new email address using the same method used to invite the participant for the first time

All information is saved, and participants will have access to their information once the account is reconnected to the new address.



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Account Disconnection

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Support Process & Resources

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Participant Support Process

MyConnectSV Introduction

- Provide participant with promotional flyer resources
- Share benefits of utilizing **MyConnect**SV

Account Creation

- Direct participant to resources
- Send invitation
- Offer assistance if needed

Account Utilization

- Direct participant to training resources
- Explain how you intend to use **MyConnect**SV
- Encourage participants to explore **MyConnect**SV
- Connect participants with the **Peer Support Team** for additional assistance

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Participant Resources

www.myconnectsv.org

MyConnectSV Peer Support Team

Connect participants with the Peer Support team if they are in need of additional assistance logging in or using MyConnectSV

MyConnectSV Participant Guide

Comprehensive guide including instructions and recommended uses for features.

Instructional Videos

Access to multiple short instructional videos that cover the account creation process and feature review.

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Provider Resources

scc.bitfocus.com/myconnectsv

Provider Manual and Messaging Guides

Comprehensive guide including provider and participant instructions, recommendations, and promising practices

Access to Training Session

Access to training sessions through training.bitfocus.com

Office Hours

Attend regular Santa Clara County HMIS Clarity Office hours for further assistance or to ask questions (calendar available at https://scc.bitfocus.com/events)

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Next Steps

After passing the quiz following this video, email

sccsupport@bitfocus.com

to request an update to your access role in Clarity.

You'll then get access to begin inviting and utilizing MyConnectSV with your participants!

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