



## Santa Cruz HMIS News

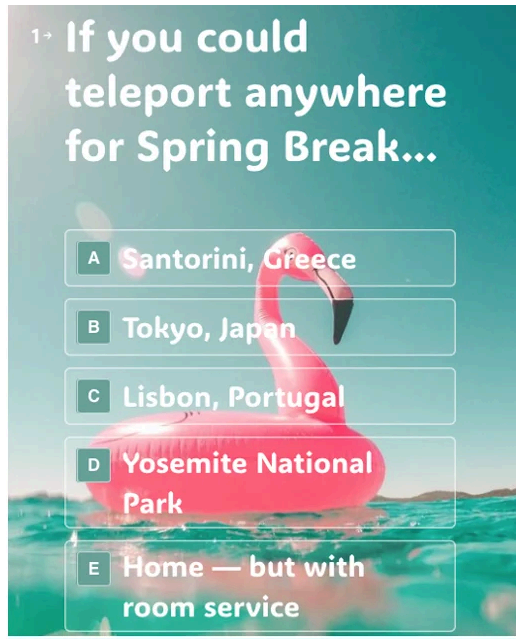
April 2025

### Welcome! In this edition, you'll find:

- Community Poll
- Upcoming Events - HMIS Office Hours
- Special Announcements
  - Reminders from our Help Desk Team
  - May Assessment Month Reminder
  - New "Name Notes (If Needed)" Field
  - HMIS Glossary Report
  - Attention Connectors - *Updated Connector HMIS User Manual*
- Clarity Human Services April Feature Updates
- Data Quality Dashboard and Report Content
- Federal Reporting Updates
  - SPMs Submitted - Thank You
  - PIT/HIC Updates
- Report Spotlight: [HSNG- 108] Housing Census Report



# Community Poll

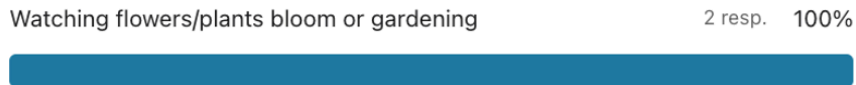


Take the poll!

## Results from last month's poll: Thanks for taking the time to respond!

✓ 1 Happy Spring! What do you look forward to most about Spring?

2 out of 2 people answered this question (with multiple choice)



## Upcoming Events

### Housing for Health - HMIS Office Hours

Housing for Health and Bitfocus host office hours every **fourth Monday of each month** (in lieu of HMIS Workgroup meetings). Drop-in for as long or as short as you'd like to ask any and all questions related to the HMIS. All users are

welcome. Please join us within the first 15 minutes or we will assume nobody will be joining us for Office Hours.

Next Office Hours: Monday, May 26th, 2025 | 1 p.m.- 2:30 p.m.

Register Here



## Special Announcements

### May Assessment Month Reminder:

A friendly reminder that May is the month to update those Current Living Situation Assessments, and Status Update Assessments. You can also refer to **Quarterly Assessment Policy** for more details.

#### Quarterly Assessment Completion Timelines:

	At Program Enrollment	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
<b>Current Living Situation (CLS) Assessment</b>	Yes	No	Yes	No	No	Yes	No	No	Yes	No	No	Yes	No
<b>Status Update (SU) Assessment</b>	No	No	Yes	No	No	Yes	No	No	Yes	No	No	Yes	No

### NEW Name Notes Field added to Client Profile Screen

#### What This Means

There is a new field that's just been added to the HMIS Client Profile screen called:

### Name Notes (If Needed)

This is an optional text box field where you can add notes regarding the profile name, preferred names, aliases, etc. This was implemented to allow for any relevant information relating to the significance of preferred names, such as which one is the legal name to use on legal documents and which is the name a person prefers to be called.

## New Resource Alert

### HMIS Glossary Report Resource

We just created a valuable new resource now available on the [Santa Cruz Bitfocus website](#), the [HMIS Glossary Report](#). This resource was created to help all HMIS users navigate the most helpful HMIS Reports located in the report library. Each report comes with a clear description of its purpose and examples of when to use the reports, making your day-to-day reporting tasks smoother and more efficient.

The [HMIS Glossary Report](#) covers a wide range of categories including:

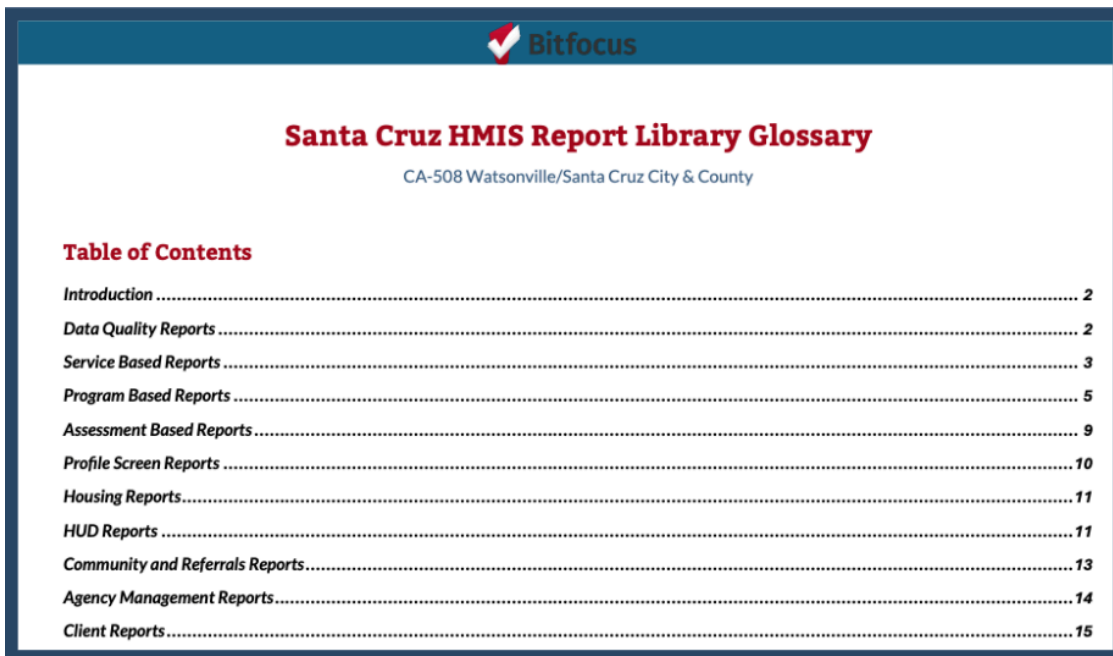
<b>Data Quality</b>	<b>Assessment Based Reports</b>	<b>HUD Reports</b>
<b>Service Based Reports</b>	<b>Profile Screen Reports</b>	<b>Community and Referrals Reports</b>
<b>Program Based Reports</b>	<b>Housing Reports</b>	<b>Client Reports</b>

Some highlighted reports include:

- Program Roster
- Annual Performance Review (APR)
- HMIS Data Quality
- User Caseload
- Client Case Notes

Whether you're addressing data quality issues, preparing for federal reporting or managing client information, the HMIS Report Library Glossary is a great guide!

[Check out the Glossary](#)




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**Attention Connectors - Updated HMIS Connector Manual**  
**Updated CE Program Connector HMIS User Manual –**  
**Now Available!**

The Coordinated Entry (CE) Program Connector HMIS User Manual has been revised as of March 2025! This condensed guide provides clear, step-by-step instructions on the expected HMIS workflow for CE in Santa Cruz County.

What's inside:

- How to enroll participants into CE projects
- Entering Current Living Situation (CLS) assessments
- Managing referrals, housing status, and exits
- Helpful reminders to stay aligned with local guidance
- Use this as your quick reference tool when entering data or reviewing CE workflows!

[Read the CE Program Connector HMIS User Manual](#)



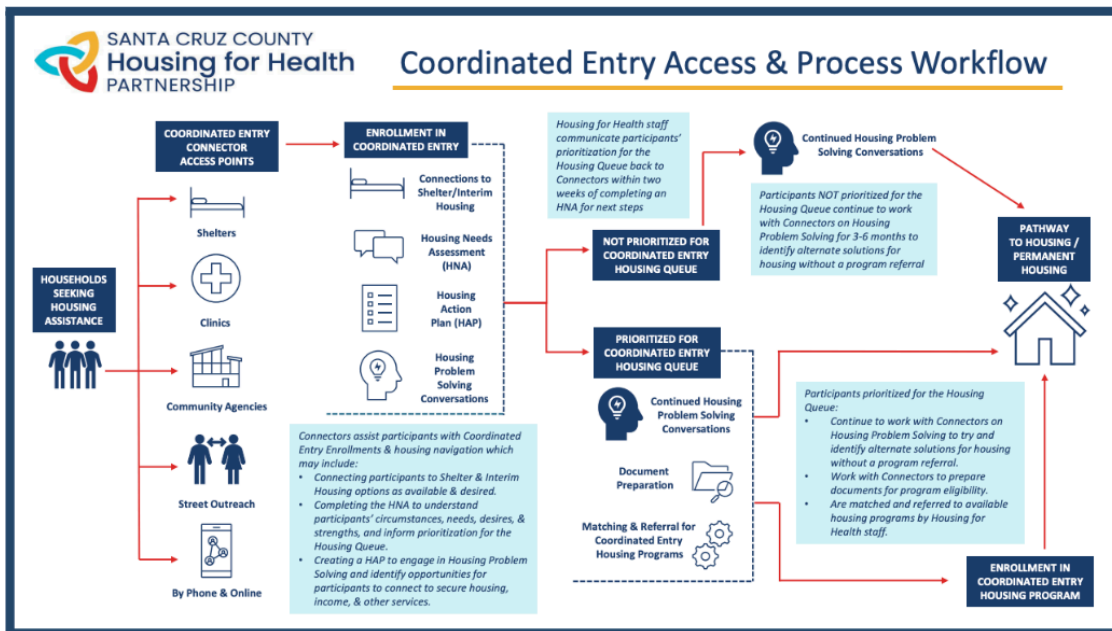
# Coordinated Entry Program Connector HMIS User Manual

CA-508 Watsonville/Santa Cruz City & County



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**Need a Quick Refresher on How Households Access  
Coordinated Entry?**



Get the CE Access & Process Flowchart

For more information on Santa Cruz County's Coordinated Entry System, please visit the [Housing for Health Partnership website](#).



## Clarity Human Services: Feature Updates

### Clarity Human Services - April 2025 Feature Updates

Here are some key updates of the Clarity system as of **April 21st, 2025**. Below is a summary of the updates we think will be most helpful for you to know. Since this isn't a comprehensive overview, we recommend checking out the full article.

Read the Full Article

**Note for All Demo's Below:** This demo is meant to highlight the *functionality* of the new features. Please note that what you see in Clarity may look slightly different depending on your access role and the HMIS agency/ies you're connected to. Some screens or icons might vary.



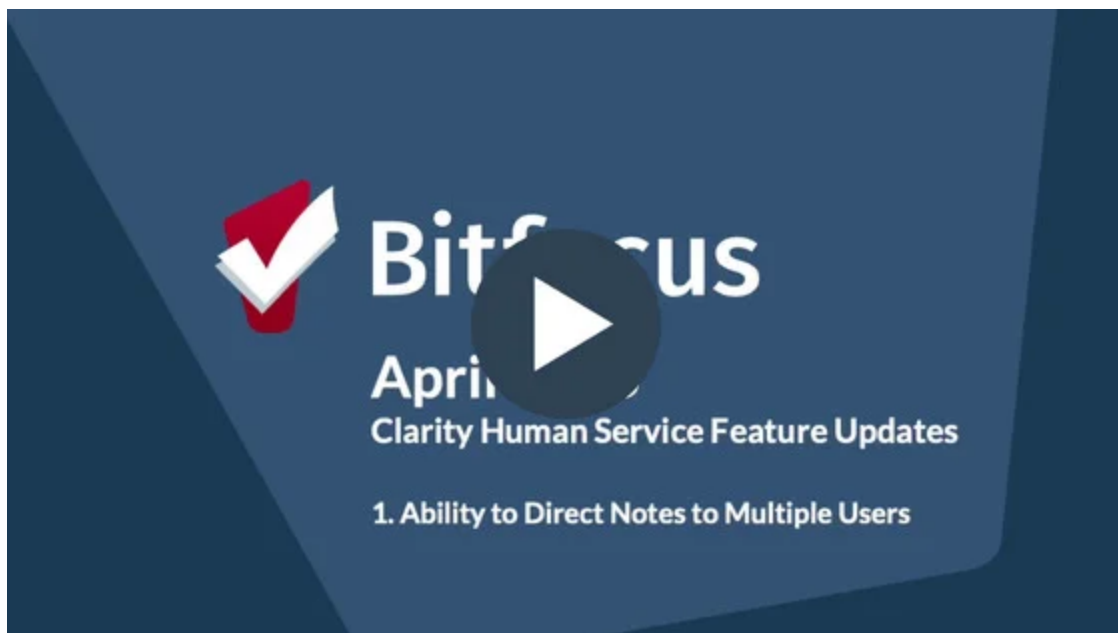
## Ability to Direct Notes to Multiple Users

Users can now tag one or more other users in a client note by using the @ icon followed by their name or email address in the Note textbox. A notification with a link to the tagged note and relevant client record will be sent to the user's email associated with their Clarity account and/or their "Staff Inbox" in Clarity, depending on their preferences.

This functionality can be used for the following types of notes:

- Referral Notes
- Client Notes
- Client Program Notes
- Contact Notes
- Location Notes
- Service Notes
- Coordinated Entry Event Notes

[Watch Demo Here](#)



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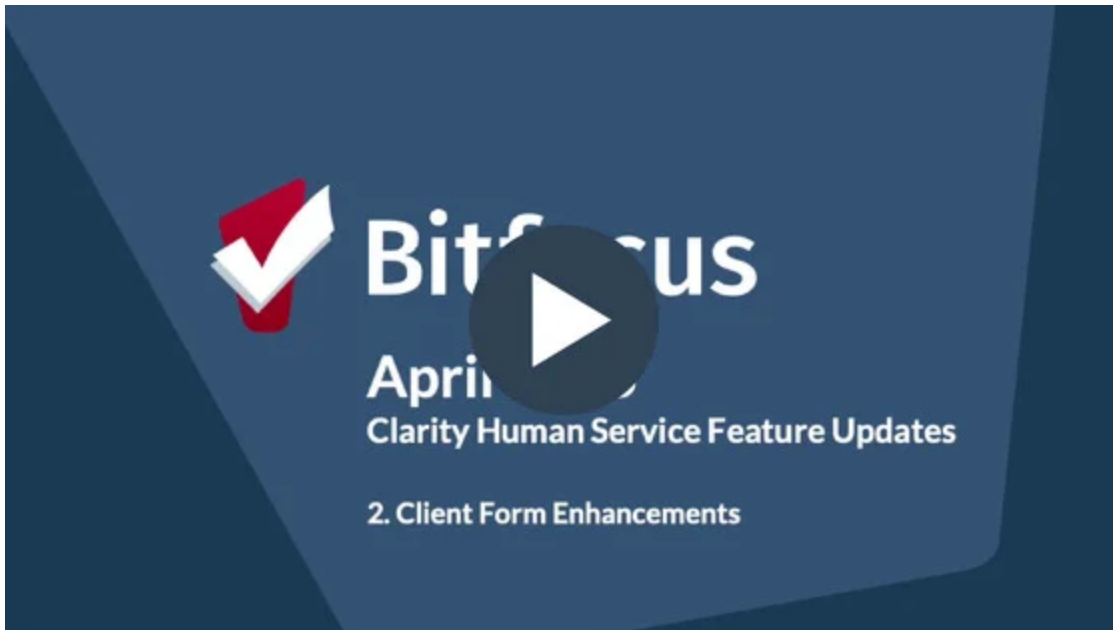
## Client Form Enhancements

Users have the ability to save drafts of forms, and they may also print a form while it is still in progress. Users with access to forms will now have the option to:

- Save & Create PDF

- Save Draft
- Cancel

[Watch Demo Here](#)



## New Clarity Interface Feature Updates and *NEW Features*

### New Caseload Management Functionality

End users with the appropriate access rights can view the following caseload information within a specific agency on the right sidebar of the Clients search page. They'll be able to see their active caseload in:

- Active Enrollments
- Upcoming, Due, and Past Annual Assessments in Status Due
- And clients with the user assigned as the Case Manager in Case Manager

[Watch Demo Here](#)



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## New Client Search Filters

The design of the Client Search screen has been updated in the new Clarity Human Services interface to allow for filtering while searching for a client. With this update, a new filter icon appears that opens a menu with filter options. The filter options are:

- First Name
- Last Name
- Alias (*On the client profile screen in Santa Cruz's HMIS is labeled as "Preferred Name"*)

[Watch Demo Here](#)



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## New Client Search Column Selector

The design of the Client Search screen has been updated. The Client Search screen also has expanded functionality to allow a user to customize their search results view by adding and removing columns from the search display results. The design of the Client Search screen has been updated in the new Clarity Human Services interface. In addition to the above update, the Client Search screen also has expanded functionality to allow a user to customize their search results view by adding and removing columns from the search display results.

### The default columns are:

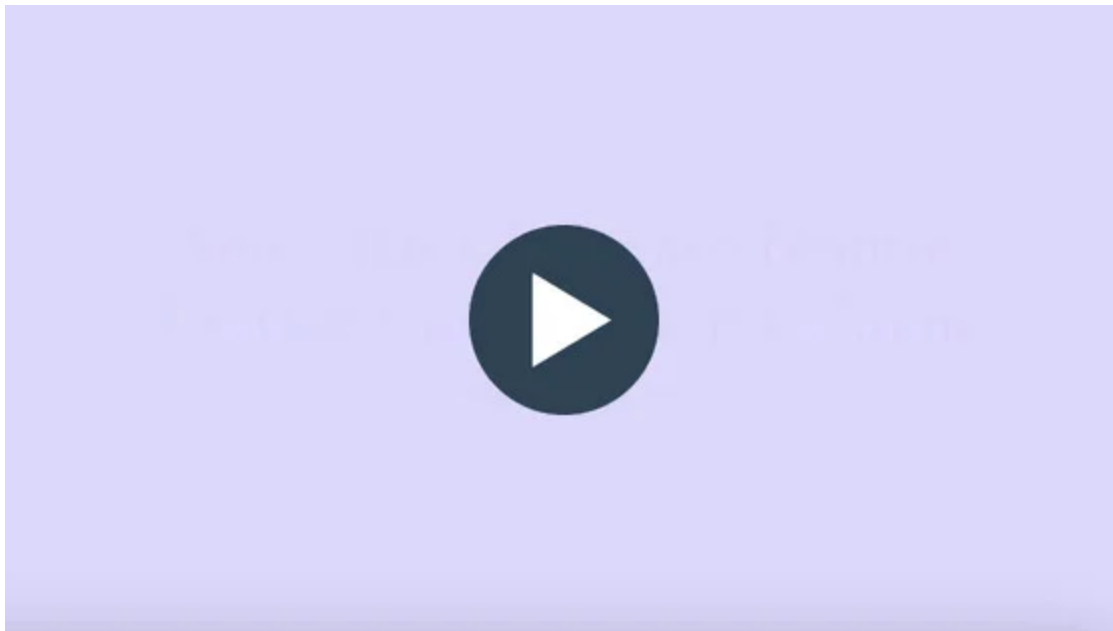
- Client (Name and Unique Identifier)
- DOB (Date of Birth and Age)
- SSN (Last four digits of the SSN)
- ROI (Release of Information Status)
- Household Members icon (Icon only appears if there are household members; this column is not sortable)
- Housing Status icon (Icon only appears if client is housed; this column is not sortable)

### The new, additional column options are:

- Alias (AKA "Preferred Name" in Santa Cruz's HMIS)
- Gender

- Race and Ethnicity
- Veteran Status
- Custom fields on the Client Profile screen

[Watch Demo Here](#)



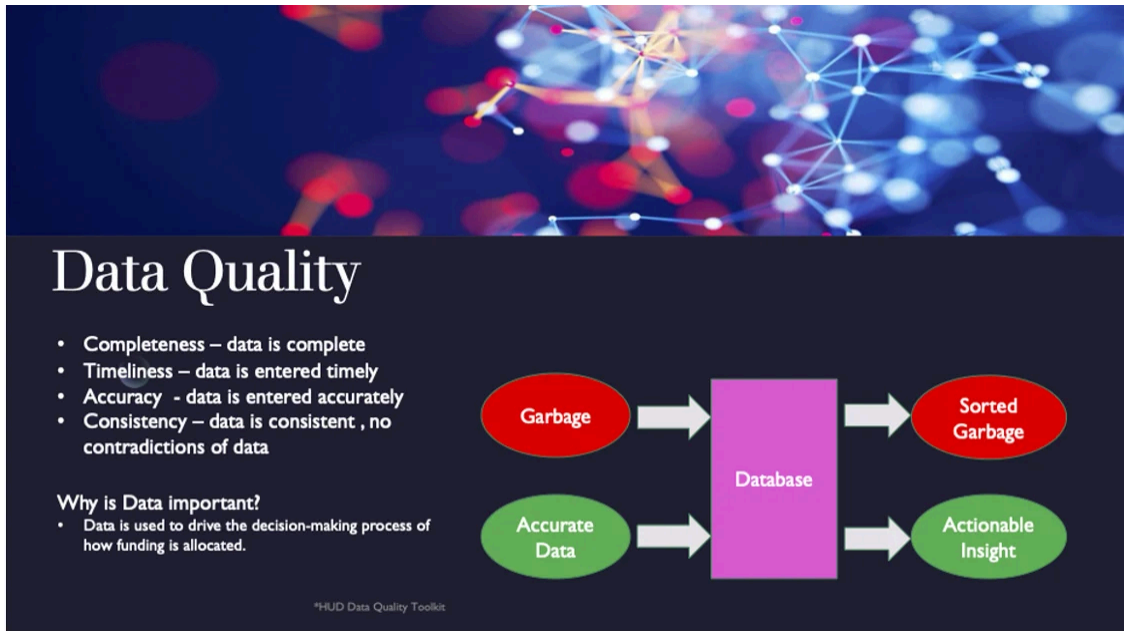
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We know that keeping up with all the Clarity Human Services feature updates can feel a bit overwhelming but we've got you covered! If reading through all the details isn't your thing, why not watch instead? Check out our **Past Bitfocus Webinar** to catch up on the latest updates. Just a heads-up you'll need to register first to access it. Happy watching! 🎥 ✨



## Data Quality Dashboard and Report Content

Please see the pictures below for the agency-level data quality dashboard and report content updates. This is updated monthly - check it out!

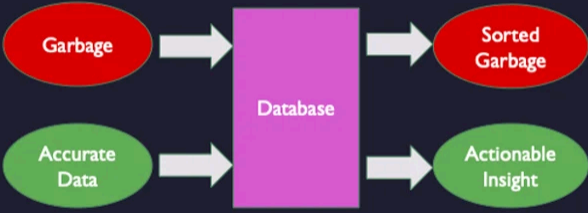


**Data Quality**

- Completeness – data is complete
- Timeliness – data is entered timely
- Accuracy - data is entered accurately
- Consistency – data is consistent , no contradictions of data

**Why is Data important?**

- Data is used to drive the decision-making process of how funding is allocated.



\*HUD Data Quality Toolkit

Continue Reading



## Federal Reporting Updates

### System Performance Measures (SPM) - Submitted!

The 2024 System Performance Measures were submitted earlier this month before the submission deadline on 4/11.

*Thank You* so much for your responsiveness to all our data quality emails related to federal reporting. Federal reporting is a stressful and time-consuming time for all, and we are grateful to have such a great team to work alongside and get it done! All of us at Bitfocus thank you for your effort to maintain high data quality!

### HIC/PIT

#### Timeline Updates

Although we don't yet have a confirmed timeline for the 2025 HIC/PIT submission deadline to HUD, we are expecting the HIC/PIT module to open in HDX soon. Once it opens, it should remain available for at least 30 days. This will be a high-priority task once it's live to ensure we have enough time to complete and submit everything on

time. In the meantime, we'll continue with our regular Data Quality Cleanup and Review Process.

### High/Low Utilization Review

Thank you to all the Agency Leads who have already shared updates regarding high and low utilization for the HIC/PIT! We'll continue to reach out if additional information is needed.



## Report Spotlight

### [HSNG-108] Housing Census Report

#### Purpose

This report for housing programs gives you a day-by-day look at how many beds were occupied in your housing programs during a specific time period. It is based on entry and exit data.

Here's how it works depending on the project type:

- For Emergency Shelter – Night-by-Night projects, it uses bed nights to track occupancy
- For Permanent Housing programs, it looks at Housing Move-in Dates to calculate when someone is housed.

The report separates the data by each program you select and shows the maximum number of beds available during the reporting period. This is based on what is entered in the Program Bed Inventory Screen.

The report will display the maximum bed occupancy (from the Program Bed Inventory screen) for each program.

- PH-RRH programs will display "Max Occupancy: Varies."
- For all other program types, if the number of units is greater than the number of beds, then a message such as "Max Occupancy: 20 beds / 52 units" will be displayed.

## Who Can Run the Report?

All users can run the report. There are restrictions on which information can be accessed based on the user's access rights.

## Report Location

This report can be found in the following locations in the Report Library:

Housing → **[HSNG-108] Housing Census**

The screenshot shows the 'Training Agency' Report Library interface. At the top, there are navigation links for 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. Below this, a breadcrumb trail shows 'Housing' with a red arrow pointing to it. To the right, it says '5 report(s)'. A list of reports follows:

Report Name	Actions
[HSNG-102] CoC Housing Asse...	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾
[HSNG-104] Monthly Housing Report	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾
[HSNG-105] Weekly Housing Ce...	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾
<b>[HSNG-108] Housing Census</b>	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾
[HSNG-200] Current Housing Av...	★   ⌂ RUN   📅 SCHEDULE   MORE INFO ▾

## How to Run the Report?

Setting your reporting parameters:



Project Type(s)	Select which project type(s) to include  *Note: Only residential program types are listed.
Program Status	All Programs Active Programs Inactive Programs
Program(s)	Select which program(s) to include
Veteran Status	Single Select
Whom do you want to generate the report for?	Individual persons Households
Report Date Range	Specify the date range of the occupancies to include in the report
Report Output Format	Web Page, PDF, or Excel  Note: If the report contains more than 10,000 rows, the Report Output Format will automatically be changed to Excel.

### Specifications and Universe

This report includes people who were actively enrolled in a housing project on each day of the reporting period but the exact rules depend on the project type:

#### Permanent Housing Including Rapid Re-Housing

- The person must be actively enrolled in a PH project at Point-in-Time (the date range you're reporting on)

AND

- Their Project Start Date (their housing move-in date) must be on or before that Point-in-Time (during the report end date)

#### Emergency Shelter - Night-by-Night

- The person must be actively enrolled in an emergency shelter project at Point-in-Time

AND

- Corresponding, Attendance generated, any Residential Service for the night of the Point-in Time (the date range you're reporting on)

## Emergency Shelter (Entry/Exit) - Safe Haven, Transitional Housing

- Active enrollment in a corresponding project at the Point-in-Time (the date range you're reporting on)

**Important Note:** For all project types, if someone exited the program on that same date, they will not be counted in the report for that date. Just a heads-up: there may be multiple inventory records within the date range you select when running the report. The report will pull in *all* inventory records that fall within that full time period, and sum them together - which will result in what appears to be inflated inventory. If you have any questions about what is set up for your program's inventory, first check in with your HMIS Agency Lead, and if they aren't sure, feel free to reach out to our Help Desk at [santacruz@bitfocus.com](mailto:santacruz@bitfocus.com).

### Report Tables

Drilldown functionality is available for this report. In other words you can click on any number in the # clients column (ie: 65) to see more detailed information about the clients included in that count.

<b>Housing Census</b>	<b>Agency Name</b>
	Veteran Status: All Report generate for: persons Date Range: 06/01/2021 thru 06/14/2021
<b>Max Occupancy: 65 beds</b>	
<b>Program Name</b>	<b># Clients</b>
<b>Date</b>	
06/01/2021	65
06/02/2021	65
06/03/2021	65
06/04/2021	65
06/05/2021	65
06/06/2021	65
06/07/2021	65
06/08/2021	65
06/09/2021	65
06/10/2021	65
06/11/2021	65
06/12/2021	65
06/13/2021	65
06/14/2021	65
<b>Total Clients Served</b>	<b>65</b>
<b>Total Bed Nights Provided</b>	<b>910</b>

When you drill down you will see the client's information (see image below)

- Unique ID
- Client Name

- Age (based on the specific date you selected)
- Data Quality Info
- Length of Stay (LOS)
  - LOS is calculated based on using the HMIS Standard Reporting Glossary, and depends on the project type, tracking method, and housing move-in date if applicable
- Project Start Date
- Project End Date
- Responsible Staff

Note: Household members are grouped together with the **Head of Household displayed in bold font** like the image below (ie. **C0982186A** = Head of Household)

Housing Census - Client Detail							
(HOSN) A New Start PSH Program							
03/01/2023							
List of Clients							
Unique ID	Client Name	Age	Data Quality	LOS	Project Start Date	Project End Date	Responsible Staff (NOTE: * denotes Inactive Assigned Staff)
<b>C0982186A</b>	<b>Charles, Charles</b>	38	100%	1,150	02/06/2020	-	Michelle Gomez
37164225E	Michelle, Michelle	38	100%	1,104	03/23/2020	-	Michelle Gomez
AAB11910F	Charles, Charles J	38	100%	1,104	03/23/2020	-	Michelle Gomez

Questions? Your HMIS Administrator is happy to help.

Phone: 831-713-2288

Email: [santacruz@bitfocus.com](mailto:santacruz@bitfocus.com)



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