



Santa Cruz HMIS News

March 2025

Welcome to the Santa Cruz HMIS March 2025 newsletter!

In this edition you'll find the following:

- Community Poll
- Upcoming Events -HMIS Office Hours and Connector Training
- Special Announcements
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- How To: Create Reminders for Annual Assessments
- Report Spotlight: [HUDX-123] Housing Inventory (HIC) Supplemental Report



News

Welcome to your Community Poll

Check Out This Fun Poll:

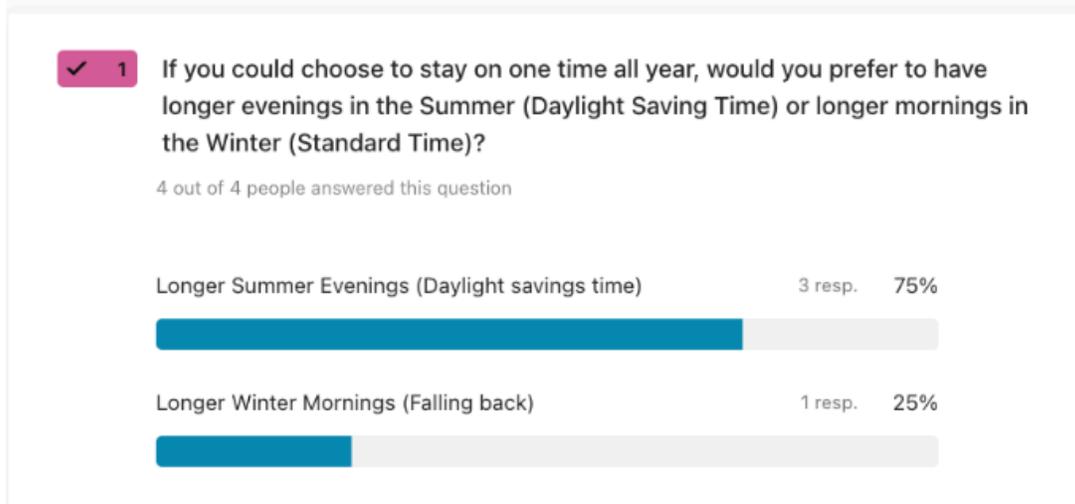
What do you look forward to most about Spring?



Take the poll!

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

Response summary



Upcoming Events

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.

Please register for the next Office Hours below.

- Monday, April 28 | 1-2:30 p.m. | Register [HERE](#)

Reminder: Next Connector Training

To all new Connectors: We hope you can join Housing for Health Partnership for the next Connector Training, **April 30** from **9:30 a.m.-3:30 p.m.** at Santa Cruz County Sheriff Community Room, 5200 Soquel Ave, Santa Cruz.

For more information on Coordinated Entry, please visit [H4H's site](#) and review [H4H Connector Expectations](#).

If your agency is interested in providing Connector services, please contact Monica Lippi, Housing for Health Manager, at Monica.Lippi@SantaCruzCountyca.gov.



Announcements

Special Announcements

New Two-Factor Authentication

Two-Factor Authentication Pilot Group April 1, 2025

Purpose

Exciting changes are coming on **April 1, 2025!** To enhance security and verify user identity when logging into Clarity, Santa Cruz will implement Two-Factor Authentication starting with HMIS Agency Leads and Housing for Health Staff.

What This Means

Starting April 1, 2025, all HMIS Agency Leads and Housing for Health Staff will be prompted to set up Two-Factor Authentication the first time you log in for added security.

How Do I Set Up Two-Factor Authentication



Setup Steps:

Choose How to Receive the Code

- Authenticator App
- Email Linked to your Clarity Account

Enter the Code:

- Once you receive the 6 digit code, enter it on the screen
- Tip: Check the “Trusted Device” box before verifying to avoid repeating the process each time you log in.

Confirmation

- After entering the code and clicking verify, you’re all set!

Tips

After setting up Two-Factor Authentication you won’t need to verify again unless:

- Using an incognito or private browser
- Logging in from a new device (computer, phone, tablet, etc.)
- If you didn’t select “Trusted Device”

Time Limit on Trusted Devices

Trusted Device status lasts for 90 days. If you don’t log in on the same device for 90 days or more you’ll be prompted to complete the Two-Factor Authentication process before accessing Clarity. If you log in regularly on the same device in the same (non-private) browser, you won’t be asked to verify.

Resources

Here are some helpful guides on setting up Two Factor Authentication.

- [How to Set Up Instructions](#)
- [Slide Deck](#)

Notice of Agency Possession of Sensitive Documentation Form

The form can be found on Santa Cruz's Bitfocus website under the Forms Tab.

- [Notice of Agency Possession of Sensitive Documentation Form](#)

This form can be uploaded into HMIS if a client declines to have a vital document uploaded into HMIS but allows a service provider to maintain a copy.

A friendly reminder, while the above form is an option, it's important to enter information carefully, ensuring that data supports the care coordination services being provided. Always be mindful of how it's framed and what's being disclosed.

If you have any questions or concerns please feel free to reach out to your HMIS Lead Loren White loren.white@santacruzcountyca.gov.



Updates

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!

[Check out the PDF!](#)

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.

```

graph LR
    G([Garbage]) --> DB[Database]
    AD([Accurate Data]) --> DB
    DB --> SG([Sorted Garbage])
    DB --> AI([Actionable Insight])
  
```

*HUD Data Quality Toolkit

Updates

Federal Reporting Updates: SPM and PIT/HIC

System Performance Measures (SPM) - Deadline

The submission deadline for the (FY) 2024 System Performance Measures (SPM) is **April 11, 2025 at 8:00 PM EST.**

Thank you very 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!

Point-in-Time Count and Housing Inventory Count Updates

Although we don't yet have a timeline for the 2025 HIC/PIT submission deadline to HUD, we will continue with our regular Data Quality Cleanup and Review Process.

We are in the data quality phase of reviewing High/Low Utilization for the HIC/PIT. This means that we will be following up with Agency Leads who have programs that are Emergency Shelter, Transitional Housing, Rapid Rehousing, Permanent Supportive Housing, and Other Permanent Housing Programs that have either Low or High utilization. More specifically, we are reviewing

programs with utilization rates that fall **below 65%** or **above 105%** on the 2025 PIT Count date on **January 29th** because we will need to provide an explanation to HUD.

- **Programs with Low Utilization (below 65%):** Low utilization rates may be the result of clients not being enrolled (and/or not having a housing move-in date added for permanent housing project types), or it could also be that the inventory has changed and needs to be decreased in the HMIS.
- **Programs with high utilization (above 105%):** High utilization rates may be the result of clients not being exited from the project in HMIS, or it could also be that the inventory has changed and needs to be increased in HMIS

Please be sure and review these emails and provide a detailed explanation as to the Low or High utilization warning you received. Additionally, you may need to enroll or exit clients, and/or add housing move-in dates to ensure accurate numbers are reported, or request that we update the Bed and Unit Inventory for your programs. Check out the [\[HUDX-123\]](#) Housing Inventory (HIC) Supplemental Report below to assist you in reviewing housing inventory.

If you have any questions related to federal reporting, please do not hesitate to reach out to santacruz@bitfocus.com.



How-to

Create Reminders for Annual Assessments

How to Receive “Assessment Due” Warnings

Clarity Human Services sends an “*Assessment Due Warning*” via email when a **HUD-Required Annual Assessment** is due in a client record to notify the **staff member assigned to the enrollment** that the due date is approaching. This helps you stay on top of deadlines.

Who Gets Warning Notifications ⚠️

Staff members receive Assessment Due Warnings when they are the designated ***Assigned Staff*** member for the program enrollment and they have the Assessment Due Warning setting toggled on in their Account Settings.

Reminders are sent to any staff assigned to a client's enrollment. You become assigned to a client if:

- a) You enter the client's enrollment into the system, or
- b) You or someone else changes the assigned staff member to you.

You can check to see if you are currently assigned to a client by going into their program enrollment and viewing Assigned Staff, or by checking your Caseload tab.

0 DAYS ACTIVE PROGRAM	
Program Type:	Individual
Program Start Date:	12/20/2023
Assigned Staff:	Sam Staffer <input type="checkbox"/>
Head of Household:	Tom Test <input type="checkbox"/>

Not Receiving Reminder Emails? 🤔

If you're not getting the Assessment Due Warning emails check the following:

Are you the Assigned Staff?

- Go to the client's program enrollment and confirm you are the assigned staff.

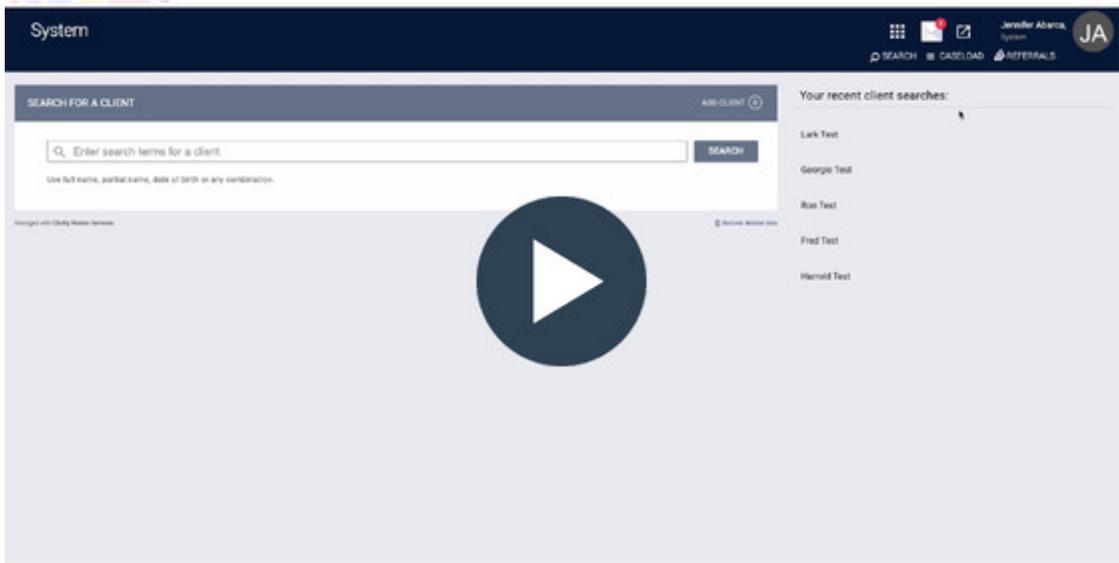
Is your Assessment Due Warning Setting Toggled On?

- Go to account settings and make sure the assessment Due Warning setting is toggled on

Reminder Settings are set when an enrollment is created. If the client was originally assigned to another staff member with different settings than yours, you will receive notifications according to that schedule. If the assigned staff member has *Assessment Due Warning* disabled, then the notification will go to the first staff member within that agency who is listed with the Agency Manager role.

Don't Want Reminders or Need a Different Schedule?

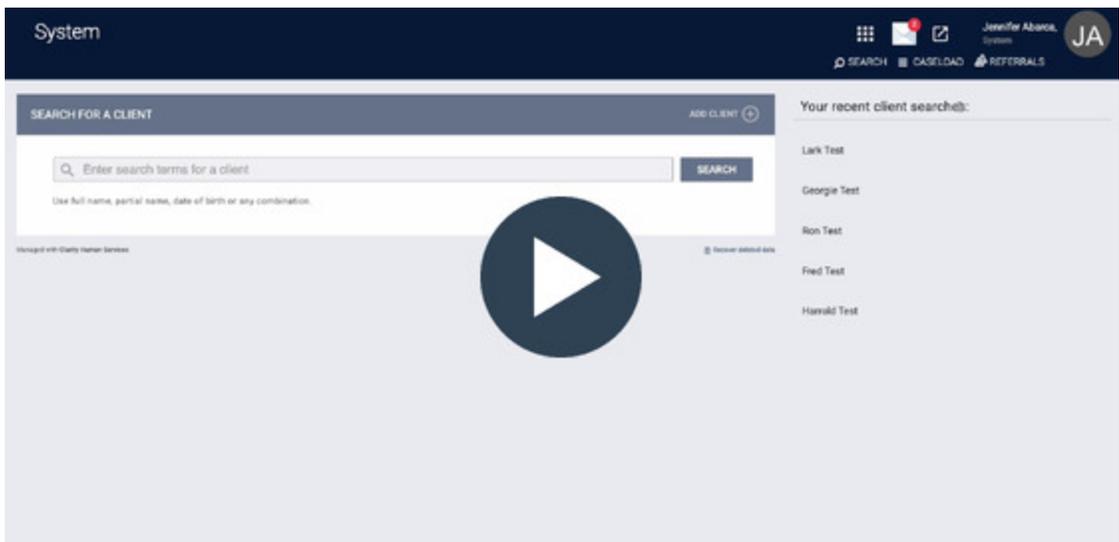
You can change your own reminder notifications either for all of your assigned clients, or on a client-by-client- basis.



Change Settings for All of Your Clients

The default setting for receiving the notification is 1 Day before the Annual Assessment Due Date, but you can change that time frame to 2 Days, 5 Days, 1 Week, 2 Weeks, or 30 Days if you prefer. You can change this default setting under your user profile. *Remember, these settings will only impact clients assigned to you from this point on. Current clients will remain on the old notification schedule until their enrollment ends.*

To access your account settings, click on the initials at the top right side of the screen and select "Account Settings." You can change the Assessment Due Warning default setting at the bottom of the "My Info" page. Remember to click Save Changes when you are done.



Report Spotlight

[HUDX-123] Housing Inventory (HIC) Supplemental Report

Report Purpose & Summary

The Housing Inventory Count Supplemental report is designed to be used as a tool to review housing inventory available for people experiencing homelessness. The report offers a point-in-time look at utilization while also being used as a visual tool to accompany LSA review for HIC reporting submissions. Logic in this report heavily relies on mimicking the LSA where relevant, while also including additional data points to aid in reporting review and analysis.

Housing Inventory (HIC) Supplemental [FY 2025]												CoC: [Redacted]								
HIC Date Quality Review												FY Date: 01/04/2025								
Clients with Multiple Overlapping Enrollments												Enrollment CoC Filter: No								
												HIC Inventory Based on: Project Stays								
												Client ID Selection: Client Unique Identifier								
Bed Inventory												All Year Round								
Note: *HIC Excluded Bed counts are inferred based on population clients in residence fall into (Veterans - Veterans Status = Yes; Youth - HUD Age is <=24) and not manually input Bed and Unit inventory data when the HIC inventory prompt selected is project stays																				
Organization ID	Organization	Project ID	Project Name	Project Type	Geocode	HHS Participation Status	Target Population	Funding Source(s)	Housing Type	VSP	Is LSA?	Bed Type (See Note)	Total Beds	PIT Count	Active Clients	... with Children				
554	[Redacted]	2019	[Redacted]	ES-GE	78957	HMS	NA: Not applicable	N/A	Single Site	No	Yes	Family-based beds	18	8	8					
554	[Redacted]	2219	[Redacted]	PSH	78957	NA: Not applicable	HUD CoC - Permanent Supportive Housing		Single Site	No	No		32	1	1	12	2	10	8	4
Residential Programs w/o Inventory																				
Organization ID	Organization	Project ID	Project Name	Project Type	Geocode	Target Population	Funding Source(s)	Inventory Review	PIT Count											
554	[Redacted]	2103	[Redacted]	PSH	78957	NA: Not applicable	N/A	No Active Enrollments on PIT Date	8											
Site Information																				
Organization ID	Organization	Project ID	Project Name	Project Type	VSP	Site ID	CoC	Address	Zip Code											
554	[Redacted]	2019	[Redacted]	ES-GE	No	655	[Redacted]	12345 w. Averages Rd	88005											
554	[Redacted]	2103	[Redacted]	PSH	No	655	[Redacted]	12345 w. Averages Rd	88005											
554	[Redacted]	2219	[Redacted]	PSH	No	655	[Redacted]	12345 w. Averages Rd	88005											
Newly Closed Or Newly Opened Projects																				
Organization ID	Organization	Project ID	Project Name	Project Type	Operating Start Date	Operating End Date														
No data to display...																				

HIC Reporting Submissions

HUD requires CoCs to use a single-day export of the LSA for HIC uploads to HDX 2.0.

For more information about HIC submissions in HDX 2.0, please review [Reporting PIT Count and HIC Data in HDX 2.0 from the HUD Exchange.](#)

Who Can Run the Report

Agency Level - Anyone can run this report, but the returned information will be limited based on the user's access rights.

Admin Level - System administrators and users with additional access can run the report across multiple agencies.

Running the Report and Selecting Parameters

To run the [[HUDX-123](#)] **Housing Inventory (HIC) Supplemental Report** users need to select the agency, CoC project types, program status and PIT dates. The report includes key details like bed and unit counts, funding sources, and data quality checks.

Here's a quick overview of what you need to select when running the HIC report. For detailed instructions, please refer to the full article [here](#):

- **Agency** – Choose which agencies to include (all, single, or multiple)
- **CoC** – Select which CoC to report on
- **Project Type** – Pick the project types to include
- **Program Status** – Choose all, active, or inactive programs (all is recommended)
- **Programs** – Select which programs to include
- **Enrollment CoC Filter** – Filters households based on CoC; recommended to match LSA
- **RRH Inventory** – Based on project stays or program inventory
- **Client ID** – It is recommended to use Clarity UID (default)
- **PIT Date** – Set to the CoC's point-in-time date on January 29, 2025
- **Last Year's PIT Date** – Used for tracking newly opened/closed projects
- **Output Format** – Choose from webpage, PDF, or Excel

[Continue reading](#)

Questions? Your HMIS Administrator is happy to help.

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