



Bitfocus



COUNTY OF
MARIN



Agency Leads Meeting: July 16, 2025

Agenda

- Announcements
 - Introductions welcome Kathleen!
 - License Updates
 - HMIS User Survey
- Federal Reporting Debrief & Data Quality Recommendations
- *NEW* - HMIS Report Library Glossary
- Report Spotlight
 - *Newly Updated* [STFF-103] Staff Active Caseload
- Open Communication



Announcements

Introductions



Welcome
Kathleen!

Announcements

License Policy

--->Updates

--->Q&A



Announcements

HMIS User Survey



- > Thank you all for participating in the HMIS User Survey - we truly appreciate your responses.
- > We rely on your feedback in order for us to create new resources and boost your engagement and confidence in using the HMIS and are looking forward to the feedback we received this year.
- > **Total Responses this year: 40**

Federal Reporting Debrief

What was most helpful to you during federal reporting?



What were the biggest challenges or areas for improvement?



Are there any lessons learned or key takeaways that can be applied to future federal reporting?



What tools or processes were particularly helpful, and what should be avoided in the future?



Are there ways we can improve coordination and collaboration in the future?



Data Quality Recommendations

--->A data quality monitoring plan, combined with staff training, can improve data quality and data habits over time

--->[Year Round Data Quality Review Guide](#)



Review and Address Data Quality Issues Periodically

Monthly:

- Enrollment and Exit Dates
- Enrollment Households and Relationship to Head of Household
- Housing Move-in Date

Quarterly:







- Overlapping enrollments
- Duplicate Clients
- Exit Destination
- Annual Assessments









Semi-annually:

- Project Type
- Project Operating Dates
- Project Funding Sources
- Bed and Unit Inventory
- Project Sites/Geocodes








Resources:

- Useful reports and tips that match the monthly, quarterly, and semi-annual review schedules to make data checks easier

Monthly Check Focus	Report Link
 <p data-bbox="545 496 1156 544">Enrollment and Exit Dates</p>	 <p data-bbox="1416 496 2079 544">[GNRL-106] Program Roster</p>
 <p data-bbox="448 718 1268 829">Enrollment Households/ Relationship to Head of Household</p>	 <p data-bbox="1416 718 2175 893">[GNRL-106] Program Roster and [HUDX-225] HMIS Data Quality Report</p>
 <p data-bbox="545 1011 1080 1058">Housing Move-in Date</p>	 <p data-bbox="1416 1011 2079 1058">[GNRL-106] Program Roster</p>

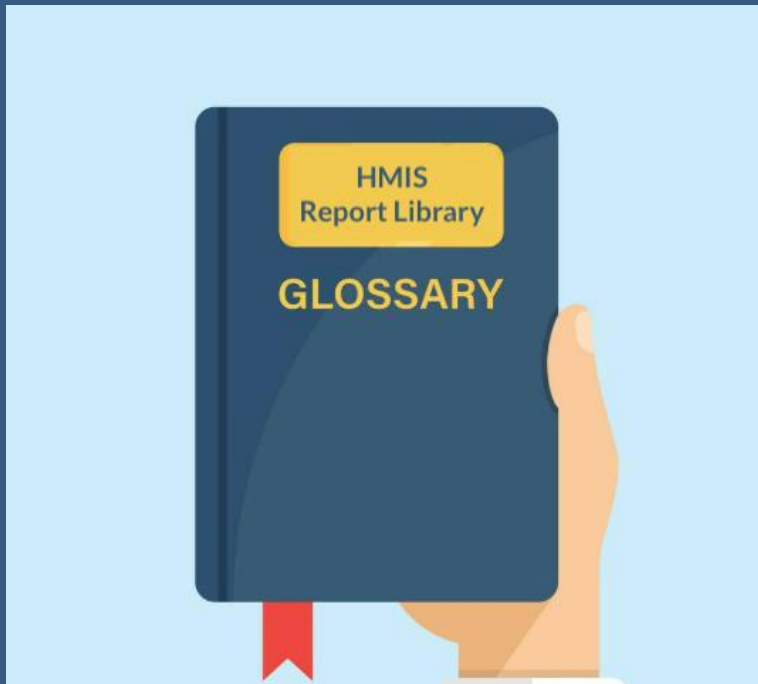
Quarterly Check Focus	Report Link
 Overlapping Enrollments	 LSA Data Cleanup: Overlapping Enrollments
 Duplicate Clients*	 [DQXX-110] Duplicate Clients*
 Exit Destination	 [HUDX-225] HMIS Data Quality Report
 Annual Assessments	 [GNRL-409] Annual Assessment Overview and [HUDX-225] HMIS Data Quality Report

*Note: You will not be able to see duplicate clients system-wide, you will only be able to see duplicate clients within the agencies you have access to.

Semi-Annually Focus	Report Link
 Project Type	 <u>LSA Data Cleanup: Funding Source and Configuration Issues</u>
 Project Operating Dates	
 Project Funding Source	
 Bed and Unit Inventory	
 Project Sites & Geocodes	 <u>LSA Data Cleanup: Project Descriptor Data Issues</u>

NEW HMIS Report Library Glossary

HMIS Report Library Glossary



You can also find this resource on the [Marin Bitfocus Support Website](#)

A guide to the most helpful HMIS reports located in the Report Library

Report Spotlight

Newly Updated - [STFF- 103] Staff Active Caseload



[STFF –103] Staff Active Caseload

Overview

- > A detailed look at a staff's current caseload that includes client enrollment information
 - >Date of Birth (DOB)
 - >Length of Stay (LOS)
 - >Assessment
 - >Services
 - >Case Notes

[STFF –103] Staff Active Caseload

Reminder

---> A staff is considered "assigned" to a client if the staff created the client enrollment

The screenshot displays the Bitfocus Test interface. At the top, there is a navigation bar with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. Below this, two program entries are listed:

Program Name	Start Date	Status	Type
Street Outreach Downtown Streets Team ⓘ	01/13/2025	Active	Individual
CAM Housing Case Management Services Only Community Action Marin ⓘ	02/11/2024	Active	Individual

Below the program list, a section titled "PROGRAMS: AVAILABLE" is shown. Underneath, the "Marin Goals Assessment Program (TEST)" is expanded, revealing details:

- Funding Source:** HUD: ESG – Emergency Shelter (operating and/or essential services)
- Availability:** Full Availability
- Include group members:** Baby Sara Testing

At the bottom of the interface, there is a "PRINT DIRECTIONS" button and an "ENROLL" button. A red arrow points from the "PRINT DIRECTIONS" button to the "ENROLL" button, which is highlighted with a red rectangular border.

[STFF –103] Staff Active Caseload

OR

→ A staff is considered "assigned" to a client if the staff was assigned to the client within Clarity

97 DAYS ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	04/08/2025
Assigned Staff:	Jennifer Abarca <input checked="" type="checkbox"/>
Head of Household:	Bitfocus Test <input checked="" type="checkbox"/>

97 DAYS ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	04/08/2025

CHANGE ASSIGNED STAFF

Make Program Private

Jennifer Abarca


- Margarita Castro
- Matt Smith
- Meredith Parnell
- Patricia Bigornia
- Ray Cadatal
- Saul Pineda
- Tiana Naples
- Jennifer Abarca

Before

[STFF-103]
User Active
Caseload

Agency Management

[STFF-101] User Activity Report

[STFF-103] User Active Caseload 

[STFF-104] Staff Client Data Activity Report

[STFF-106] User Client Note Hours Tracked

Now

[STFF-103]
Staff Active
Caseload

Agency Management

[STFF-101] User Activity Report

[STFF-103] Staff Active Caseload

[STFF-104] Staff Client Data Activity Report

[STFF-106] User Client Note Hours Tracked

Before

You could only select 1 Staff

Choose...
Abadajos, Regina
Abarca, Jennifer
Crews-Holloway, Alexis
✓ Sutton-Dement, Melissa

Web Page PDF Excel

Agency Management > [STFF-103] User Active Caseload

User: Sutton-Dement, Melissa

Report Output Format: Web Page PDF Excel

SUBMIT

Now

You can select by staff Status and select multiple staff

Staff Status(es)

- All
- Active
- Inactive
- Locked
- Deleted

Staff

- Abarca, Jennifer
- Admin, Admin
- Brady, Nikolas
- Crews-Holloway, Alexis
- Doyle, Elizabeth

Report Output Format: Web Page PDF Excel CSV

[STFF –103] Staff Active Caseload

New Report Parameters

Project Type

Program Status

Program

Staff Status & Multiselect

REPORT LIBRARY

Agency Management > [STFF-103] Staff Active Caseload

Project Type(s)
All
Emergency Shelter – Entry Exit
Emergency Shelter – Night-by-Night
Transitional Housing

Program Status

Program(s)
Marin Goals Assessment Program (TEST)

Staff Status(es)
All
Active
Inactive
Locked

Staff
All
Abarca, Jennifer
Admin, Admin
Brady, Nikolas

Report Output Format Web Page PDF Excel CSV

Note: If the report contains more than 20,000 rows, the Report Output Format will be automatically changed to CSV
Note: * denotes Inactive Assigned Staff; ** denotes Deleted Assigned Staff

SUBMIT

Before

1 Table Per Program

1 Drilldown UID

Total Clients

User Active Caseload Report

Marin Training Agency

User: Melissa Sutton-Dement
Program Status: active

Coordinated Entry Program							
Client	Unique ID	Birth Date	Household Member	Date Start	LoS	Assessments	Services
Beach, Stinson	E925755AE	08/28/1991	2	06/29/2022	1058	3	0
Reyes, Point	BBBC26DD8	05/24/1985	2	06/29/2022	1058	1	0

Total: 2

SVDP CalWORKS Housing Support							
Client	Unique ID	Birth Date	Household Member	Date Start	LoS	Assessments	Services
Gate, Golden	06965E2AD	03/25/1948	1	02/11/2022	1196	0	0

Total: 1

Grand Total: 3

Wed May 21 12:23:42 PM 2025


Powered By  CLARITY
HUMAN SERVICES 1/1

Now

2 Tables

Relationship to HoH & Case Notes

Total Details

Staff Active Caseload Report								St. Vincent de Paul	
								Program(s): All	
								Staff Status(es): Active, Inactive, Locked, Deleted	
								Staff: Multiple Selections	
Assigned Staff: Abarca, Jennifer									
Client Name	Unique ID	Birth Date	Relationship to HoH	Start Date	LoS	Assessments	Services	Case Notes	
<i>SVDP - Senior Shallow Rent Subsidy Program - Project Type: Homelessness Prevention</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2025	40	0	0	0	
<i>SVDP Encampment Relocation Program (ERP/HHAP): Novato - Project Type: Services Only</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/18/2025	27	0	0	0	
<i>SVDP HHIP - Project Type: PH – Rapid Re-Housing</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	04/08/2025	98	0	0	0	
<i>SVDP: Homelessness Prevention - Rapid Rehousing - Project Type: Homelessness Prevention</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2025	40	0	0	0	
								Total Households: 4 Total Enrollments: 4 Total Clients: 1	
Staff Caseload Overview									
Staff Name	# of Households	# of Enrollments	# of Clients	Staff Name	# of Households	# of Enrollments	# of Clients		
Abarca, Jennifer	4	4	1	Crews-Holloway, Alexis	0	0	0		
Sutton-Dement, Melissa	0	0	0						
Note: * denotes Inactive Assigned Staff; ** denotes Deleted Assigned Staff									
Mon Jul 14 09:10:41 PM 2025								Powered By 	

Staff Active Caseload Report

St. Vincent de Paul

Program(s): All
Staff Status(es): Active, Inactive, Locked, Deleted
Staff: Multiple Selections

Assigned Staff: Abarca, Jennifer

Client Name	Unique ID	Birth Date	Relationship to HoH	Start Date	LoS	Assessments	Services	Case Notes
<i>SVDP - Senior Shallow Rent Subsidy Program - Project Type: Homelessness Prevention</i>								
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2025	40	0	0	0
<i>SVDP Encampment Relocation Program (ERP/HHAP): Novato - Project Type: Services Only</i>								
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/18/2025	27	0	0	0
<i>SVDP HHIP - Project Type: PH - Rapid Re-Housing</i>								
Test, Bitfocus	25CF7910A	05/03/1987	Self	04/08/2025	98	0	0	0
<i>SVDP: Homelessness Prevention - Rapid Rehousing - Project Type: Homelessness Prevention</i>								
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2025	40	0	0	0

Total Households: 4
Total Enrollments: 4
Total Clients: 1

UID

Drilldown
Functionality



Bitfocus Test

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION

CLIENT PROFILE

Social Security Number *** - ** - 7598

Quality of SSN Full SSN Reported

Last Name Test

First Name Bitfocus

Quality of Name Full name reported

Quality of DOB Full DOB Reported

Date of Birth 05/03/1987 Adult. Age: 38

Middle Name Suffix None



UNIQUE IDENTIFIER
25CF7910A

Staff Active Caseload Report

St. Vincent de Paul

Program(s): All
 Staff Status(es): Active, Inactive, Locked, Deleted
 Staff: Multiple Selections

Assigned Staff: Abarca, Jennifer

Client Name	Unique ID	Birth Date	Relationship to HoH	Start Date	LoS	Assessments	Services	Case Notes
<i>SVDP - Senior Shallow Rent Subsidy Program - Project Type: Homelessness Prevention</i>								
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2024	406	3	2	1
<i>SVDP Encampment Relocation Program (ERP/HHAP): Novato - Project Type: Services Only</i>								
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/18/2025	28	0	2	0
<i>SVDP HHIP - Project Type: PH - Rapid Re-Housing</i>								
Test, Bitfocus	25CF7910A	05/03/1987	Self	04/08/2025	99	0	4	0
<i>SVDP: Homelessness Prevention - Rapid Rehousing - Project Type: Homelessness Prevention</i>								
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2025	41	0	0	0

Total Households: 4
 Total Enrollments: 4
 Total Clients: 1

Start Date

New Drilldown Functionality



Bitfocus Test

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION

Jennifer Abarca, St. Vincent de Paul

PROGRAM: SVDP - SENIOR SHALLOW RENT SUBSIDY PROGRAM

405 DAYS ACTIVE PROGRAM

Enrollment History Provide Services Assessments Notes Files ✕ Exit

Enroll Program for client Bitfocus Test

Program Date 06/05/2024

TRANSLATION ASSISTANCE NEEDED

Translation Assistance Needed No

Program Type: Individual
 Program Start Date: 06/05/2024
 Assigned Staff: Jennifer Abarca
 Head of Household: Bitfocus Test

Program Group Members

No active members

Status Assessments

Program Enrollment Screen

**New
Drilldown
Functionality**

Assessments

Assessment
Table

Staff Active Caseload Report							St. Vincent de Paul		
							Program(s): All Staff Status(es): Active, Inactive, Locked, Deleted Staff: Multiple Selections		
Assigned Staff: Abarca, Jennifer									
Client Name	Unique ID	Birth Date	Relationship to HoH	Start Date	LoS	Assessments	Services	Case Notes	
<i>SVDP - Senior Shallow Rent Subsidy Program - Project Type: Homelessness Prevention</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2024	406	3	2	1	
<i>SVDP Encampment Relocation Program (ERP/HHAP): Novato - Project Type: Services Only</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/18/2025	28	0	2	0	
<i>SVDP HHIP - Project Type: PH - Rapid Re-Housing</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	04/08/2025	99	0	4	0	
<i>SVDP: Homelessness Prevention - Rapid Rehousing - Project Type: Homelessness Prevention</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2025	41	0	0	0	
							Total Households: 4 Total Enrollments: 4 Total Clients: 1		



Staff Active Caseload Report		Bitfocus, Test - 25CF7910A	
		SVDP - Senior Shallow Rent Subsidy Program Assigned Staff: Abarca, Jennifer	
Assessments Drilldown			
Assessment Name	Assessment Date	Assessment Score	
Annual Assessment	07/15/2025		
Status Assessment	10/31/2024		
Status Assessment	06/05/2024		
			Total Assessments: 3
Note: * denotes Inactive Assigned Staff; ** denotes Deleted Assigned Staff			
Tue Jul 15 09:59:07 AM 2025		Powered By 1/1	

Click and will direct you to the assessment

New
Drilldown
Functionality

Services

Services Table

Staff Active Caseload Report								St. Vincent de Paul	
								Program(s): All	
								Staff Status(es): Active, Inactive, Locked, Deleted	
								Staff: Multiple Selections	
Assigned Staff: Abarca, Jennifer									
Client Name	Unique ID	Birth Date	Relationship to HoH	Start Date	LoS	Assessments	Services	Case Notes	
<i>SVDP - Senior Shallow Rent Subsidy Program - Project Type: Homelessness Prevention</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2024	406	3	2	1	
<i>SVDP Encampment Relocation Program (ERP/HHAP): Novato - Project Type: Services Only</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/18/2025	28	0	2	0	
<i>SVDP HHIP - Project Type: PH – Rapid Re-Housing</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	04/08/2025	99	0	4	0	
<i>SVDP: Homelessness Prevention - Rapid Rehousing - Project Type: Homelessness Prevention</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2025	41	0	0	0	
								Total Households: 4	
								Total Enrollments: 4	
								Total Clients: 1	



Staff Active Caseload Report							Bitfocus, Test - 25CF7910A		
							SVDP - Senior Shallow Rent Subsidy Program		
							Assigned Staff: Abarca, Jennifer		
Services Drilldown									
Service Category	Service Name: Service Item Name		Delivery Type	Start Date	End Date	Total Service Days	Expenses		
Rental Assistance	Rental Assistance - Senior Shallow Rent Subsidy: Rental Assistance		Single Event	07/15/2025	07/15/2025	1			
Case Management	Case Management - Senior Shallow Rent Subsidy: Case Management		Single Event	07/15/2025	07/15/2025	1			
							Total Services: 2		
Note: * denotes Inactive Assigned Staff; ** denotes Deleted Assigned Staff							Click and will direct you to the service screen		
Tue Jul 15 10:09:04 AM 2025							Powered By 1/1		

New Drilldown Functionality

Case Notes

Case Notes Table

Staff Active Caseload Report									St. Vincent de Paul
									Program(s): All Staff Status(es): Active, Inactive, Locked, Deleted Staff: Multiple Selections
Assigned Staff: Abarca, Jennifer									
Client Name	Unique ID	Birth Date	Relationship to HoH	Start Date	LoS	Assessments	Services	Case Notes	
<i>SVDP - Senior Shallow Rent Subsidy Program - Project Type: Homelessness Prevention</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2024	406	3	2	1	
<i>SVDP Encampment Relocation Program (ERP/HHAP): Novato - Project Type: Services Only</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/18/2025	28	0	2	0	
<i>SVDP HHIP - Project Type: PH - Rapid Re-Housing</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	04/08/2025	99	0	4	0	
<i>SVDP: Homelessness Prevention - Rapid Rehousing - Project Type: Homelessness Prevention</i>									
Test, Bitfocus	25CF7910A	05/03/1987	Self	06/05/2025	41	0	0	0	
									Total Households: 4 Total Enrollments: 4 Total Clients: 1



Staff Active Caseload Report					Bitfocus, Test - 25CF7910A
					SVDP - Senior Shallow Rent Subsidy Program Assigned Staff: Abarca, Jennifer
Case Notes Drilldown					
Title	Category	Date	Time Tracking	Case Note	
TEST	Case Management	07/15/2025	1h 15m	TEST	
					Total Case Notes: 1
					Note: * denotes Inactive Assigned Staff; ** denotes Deleted Assigned Staff
					Tue Jul 15 10:00:10 AM 2025
					Powered By 1/1

Click and will direct you to the case note screen

Report Demo

Open Communication

Resource
sharing

Problem
solving

Ideas for future Leads
meetings – What do
you want to see
more/less of? What's
helpful? What's not?

Cross-agency
Collaboration

Future
presentation/discussion
topic ideas – How to
make these meetings
most effective and
impactful for you?

Help Desk Support

How to get in touch with the Help Desk:

---> Use the chat feature on the [website](#) or directly from within your HMIS account.

---> Call **415-429-1400**

---> Email marin@bitfocus.com

---> Escalate to Community Admin as needed

---> *Pro-tip: You may always request to meet with them via Zoom to screen-share. This can be especially helpful when troubleshooting any issues you might be having.*



Questions, Comments, or Concerns?



Next Agency Leads Meeting: September 17, 2025