



Marin County HMIS News

May 2025

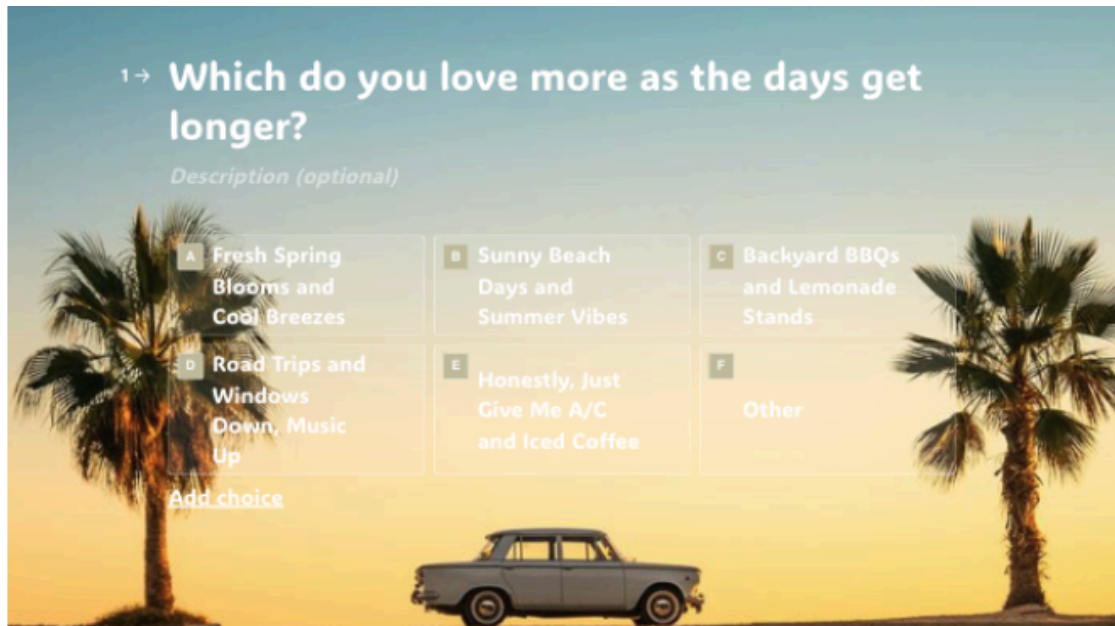
Welcome!

In this edition, you'll find the following:

- Community Poll
- Upcoming Events
- Special Announcements - "Spring into Summer" HMIS User Survey
- Federal Reporting Updates
- Clarity Toolbox: Duplicate Clients and Duplicate Enrollments
- Report Spotlight: [GNRL - 409] Annual Assessment Overview - *NEW*



Community Poll



Take the poll!



Upcoming Events

HMIS Agency Leads Meeting

We are asking the designated HMIS Agency Leads and Security Officers to join this meeting on a bi-monthly basis. Of course, if you absolutely cannot make it, please send a representative. Workgroup participants will support communications between the county, Bitfocus and agency staff with regards to community initiatives, training, privacy, security, program and data management.

- July 16th 2-3pm | *Agency Leads Only | Register [here](#)

Register Here



Special Announcements



"Spring into Summer" HMIS User Survey

This survey is designed to assess your use of the HMIS and to identify possible gaps in support, training, and other resources. We will use survey responses to address concerns that are brought to our attention, to create new resources, and hopefully, to boost your engagement and confidence using the HMIS. Your feedback is very important to our ability to support you in the ways that you need it. Please complete the survey by Wednesday, July 2nd.



We are launching the “Spring into Summer” HMIS User Survey **June 2025!** The goal of this survey is to assess your use of the HMIS and to identify possible gaps in support, training, and other resources. We will use your survey responses to address any concerns brought to our attention, create new resources, and hopefully to boost your engagement and confidence using the HMIS.

The survey is anonymous, so your name, email address, or agency will not be attached to your answer in any way (unless you'd like us to know who you are). The survey asks a few questions about your role solely to help us understand trends across different types of users. While the survey is voluntary, we are hoping to get as many responses as possible.

We encourage you to take the time to respond thoughtfully to this survey. We are here for you and want to support you using HMIS in your work as best as possible! But we cannot know where you need more support unless you bring that to our attention, so this survey is designed to do just that.

Your feedback is very important to our ability to support you in the ways that you need it. The deadline to respond is **July 2nd, 2025**. You will receive an email blast from us with this information as well, and we will continue to send out weekly email reminders with the link to this survey. Please do not hesitate to reach out to us with any questions or concerns about the HMIS User Survey.



Federal Reporting

Point-in-Time Count and Housing Inventory Count Updates

The submission deadline for the 2025 PIT and HIC reports to HUD is June 13th, 2025 at 5pm PT. Thank you so much for your responses to all our emails throughout the federal reporting season. We are so close - the finish line is in sight! Hang in there with us! If you have any questions related to federal reporting, please do not hesitate to reach out to marin@bitfocus.com.

Curious about past reports?

[CoC Housing Inventory County Reports](#)

[CoC PIT and HIC Data Since 2007](#)

[PIT Trendinator by Matt Schnars](#)



Clarity Toolbox

Duplicate Clients and Duplicate Enrollments

As part of continued efforts to increase data quality, we wanted to highlight how to address the most common, and avoidable mistakes we encounter when reviewing system-wide data quality.

How to Find Duplicate Clients

You can use the [\[DQXX-110\] Duplicate Clients](#) report to help you identify when your clients have duplicate profiles within the agencies that you have access to. See the report spotlight below to find out more about this report!

How to Correct Duplicate Clients

If you find duplicate clients and need to have them merged please reach out to Helpdesk at marin@bitfocus.com to request the merge. Be sure to let us know the following:

- The unique IDs of the two (or more) clients who need to be merged (never send identifying information via email!)
- Which client is the “primary” client. Although all enrollment, service, coordinated entry and other information about duplicate clients will be merged together, we can only keep one client profile. The primary client is the one whose profile we want to keep (usually this means it has more complete information than the other profile.)

How to Find Duplicate Enrollments

Duplicate enrollments can happen for a variety of reasons:

- When duplicated clients are merged together, enrollments for both clients are assigned to the remaining client, which can result in duplicate enrollments.
- Returning clients are enrolled with incorrect start dates, making it look like two separate enrollments are duplicate enrollments.
- Start or end dates on an enrollment get edited to overlap each other.
- Rather than removing an exit date to re-open an enrollment, users sometimes create a new enrollment with the same or similar start date.
- Multiple staff entering enrollments for clients without checking the client's history to see whether they've already been enrolled.

How to Correct Duplicate Enrollments

Once you're ready to fix your duplicate enrollments, you should do the following:

- Decide which enrollment you want to keep. You can always change enrollment dates and update information, so if you're comparing enrollments and one has annual assessments, family members, and clients notes, while the other has only enrollment screen information, you should keep the more detailed one (Need to compare enrollment data? Use the **[GNRL-220] Program Details** report.)
- Update the target enrollment (the one you want to keep) with any missing information from the duplicate enrollment (again, the **[GNRL-220] Program Details** report can help).

- If you need to move services from the duplicate enrollment to the target enrollment, we recommend asking the Help Desk to do this for you. Just be very clear with which services you want to move from the duplicate enrollment to the target enrollment.
- Once you've updated any details and have information on any services that may need to be moved to the target enrollment, contact the Help Desk with your request to delete the duplicate enrollment (and move any services, if applicable).

Contact the Helpdesk at marin@bitfocus.com and they can work with you to get your enrollments cleaned up.



Report Spotlight

[GNRL - 409] Annual Assessment Overview

Report Purpose & Summary

This program enrollment-based report provides a detailed view of the Annual Assessment Statuses. It tracks client progress regarding their annual assessments, providing insights into the timely completion of assessments, overdue assessments, and data-related issues to assist with data quality, compliance, and monitoring.

Who Can Run the Report

Anyone can run the report; however, the returned information will be limited based on the access rights of the user.

Report Location

This report is found in the Program Based section of the Report Library as [\[GNRL-409\] Annual Assessment Overview](#)

REPORT LIBRARY

Favorite Reports	9 report(s) ▾
Data Quality Reports	6 report(s) ▾
Service Based Reports	13 report(s) ▾
Program Based Reports	24 report(s) ▴
<hr/>	
[GNRL-407] Service Summary [Program Based]	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾
[GNRL-408] Service Issuance Summary [Program Based]	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾
[GNRL-409] Annual Assessment Overview	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾
[JRSD-104] Zip Code Jurisdictional Breakout	★ ⌂ RUN 📅 SCHEDULE MORE INFO ▾

Parameters

The following parameters are required for the Annual Assessment Overview report:

**To Select multiple options sequentially, hold down the Control/Command and Shift on your keyboard*

Project Type(s)	Select which Project Type(s) to include: All, Single Select, or Multi-Select*
Program Status	All Programs, Active Programs or Inactive Programs <div> <div>Program Status</div> <div> Choose... All Programs Active Programs Inactive Programs </div> </div>
Program(s)	Select which Program(s) to include: All, Single Select, or Multi-Select*
Annual Assessment Status(es)	Select which Annual Assessment Status(es) to include: All, Single Select, or Multi-Select. <div> <div>Annual Assessment Status(es)</div> <div> Choose... All Completed Completed Out of Range Past Due Due Assessment Window Opening in 30 Days Not Due Enrolled Less than 1 Year Data Issue Exited Before HoH's 1st Anniversary </div> </div>
Report Start Date	Choose the Report Start Date. Note: The Report End Date automatically fills with the current date
Report Output Format	The Web Page output is great for clicking directly into client's profiles in Clarity <div> <div>Report Output Format</div> <div> <input checked="" type="radio"/> Web Page <input type="radio"/> PDF <input type="radio"/> Excel </div> </div>

*Administrator version please refer to the article for additional report parameters for your access role [here](#).

Report Universe

The report applies to **Active Client** and includes all project stays that were active on or between the Report Start Date and Report End Date.

Active clients: are identified based on their project start date, project exit date, and the report's date range.

Note You will only see one field to enter the start date as shown in image below because the report end date will default to the current date you're running the report.

Report Start Date

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Report Output Format

☒ Web Page

☐ PDF

☐ Excel

Note: Report End Date auto populates with Current Date.

If the report contains more than 20,000 clients, the Report Output Format will be automatically changed to Excel

Specifications

The report includes the following tables for each program:

- [Annual Assessment Overview](#)
- [Client Detail](#)

Annual Assessment Overview

The Annual Assessment Overview table, displays the count of Annual Assessment Statuses.

Heritage House - NPLH (HH/VV)

Annual Assessment Overview									
Annual Assessment Status	Completed	Completed Out of Range	Past Due	Due	Assessment Window Opening in 30 Days	Not Due	Enrolled Less than 1 Year	Data Issue	Exited Before HoH's 1st Anniversary
# of Assessments	0	0	2	0	0	2	0	0	0

Client Detail

Unique ID	Client Name	Relationship to HoH	Start Date	Exit Date	LOS	Expected Annual Assessment Count	Completed Annual Assessment Count	Last Annual Assessment Date	Last Annual Assessment Status	Next Annual Assessment Due	Next Annual Assessment Status	Assigned Staff	More Info
0E7711AE7	Cove, Napa	Self	03/01/2024	-	449	1	0	-	Past Due	03/01/2026	Not Due	M. Sutton-Dement	More Info
38F608B67	Peak, Berryessa	Self	01/01/2024	-	509	1	0	-	Past Due	01/01/2026	Not Due	M. Sutton-Dement	More Info

Number of Persons: 2

Completed	Completed within the expected timeline (+/- 30 days from anniversary date)
Completed Out of Range	Completed outside of the expected timeline (+ 31 days from the anniversary date)
Past Due	No relevant completed assessment compared to the anniversary date.
Due	Assessment Due Date is within +/- 30 Days from the anniversary date.
Assessment Window Opening in 30 Days	Assessment Due Date is 31-60 Days Away from the anniversary date.
Not Due	Assessment Due Date is 61+ Days Away from the anniversary date.
Enrolled Less than 1 Year	Client was exited prior to 365 Days from the anniversary date.
Data Issue	Annual Assessment Dates cannot be inferred due to no HoH or other data issues.
Exited before HoH's 1st anniversary	Client exited in Report Date Range before HoH's 1st anniversary date.

Client Detail

The Client Detail table provides a client-specific summary of their program enrollment, including the number of **expected** and **completed annual assessments**, the status of their **last completed assessment**, and the due date for their **next assessment**.

Heritage House - NPLH (HH/VV)

Annual Assessment Overview									
Annual Assessment Status	Completed	Completed Out of Range	Past Due	Due	Assessment Window Opening in 30 Days	Not Due	Enrolled Less than 1 Year	Data Issue	Exited Before HoH's 1st Anniversary
# of Assessments	0	0	2	0	0	2	0	0	0

Client Detail												
Unique ID	Client Name	Relationship to HoH	Start Date	Exit Date	LOS	Expected Annual Assessment Count	Completed Annual Assessment Count	Last Annual Assessment Date	Last Annual Assessment Status	Next Annual Assessment Due	Next Annual Assessment Status	Assigned Staff
0E7711AE7	Cove, Napa	Self	03/01/2024	-	449	1	0	-	Past Due	03/01/2026	Not Due	M. Sutton-Dement
38F608B67	Peak, Berryessa	Self	01/01/2024	-	509	1	0	-	Past Due	01/01/2026	Not Due	M. Sutton-Dement

Number of Persons: 2

The columns in this report table and related calculations are described below.

Length of Stay (LOS): Calculated as the number of days between the program start date and the exit date. If the exit date is null, LOS is measured from the program start date through today + 1 day.

Expected Annual Assessment Count: The total number of anniversary due dates for a project stay where either

- the Anniversary Due Date falls on or before today,
- or the Anniversary Date Status is marked as “Completed”.

Completed Annual Assessment Count: The number of anniversary due dates for a project stay where the Anniversary Date Status is either “Completed” or “Completed Out of Range”

Last Annual Assessment Completed: Refers to the Annual Assessment Date associated with the most recent anniversary due date where the Anniversary Date Status is either “Completed” or “Completed Out of Range” (Displays “-” if no qualifying assessment is available).

Current Annual Assessment Status: Displays a Project Stay’s “Current Annual Assessment Status” as outlined in the **Annual Assessment Overview** table.

Next Annual Assessment Due: The nearest upcoming Anniversary Due Date that falls after today (Displays “-” if no date can be calculated—such as for exited project stays, or when the Current Annual Assessment Status is “Data Issue” or “Exited before HoH’s 1st anniversary”).

Drilldown Functionality

The Web Page Report Output Format was built with drill down functionality, the Annual Assessment Overview Table allows users to drill down by selecting the number of assessments as shown in the red box below. (All of those are clickable).

Annual Assessment Overview									
Annual Assessment Status	Completed	Completed Out of Range	Past Due	Due	Assessment Window Opening in 30 Days	Not Due	Enrolled Less than 1 Year	Data Issue	Exited Before HoH's 1st Anniversary
# of Assessments	0	0	1	0	0	1	0	0	0

When you click on the # of Assessments drill down (any # in red box above) you will get this **List of Clients Table** Below which includes the following information:

- Unique ID, Name, Relationship to HoH, Start Date, Exit Date, LOS, Number of Assessments, Assigned Staff

Annual Assessment Overview

Past Due

List of Clients

Unique ID	Name	Relationship to HoH	Start Date	Exit Date	LOS	Number of Assessments	Assigned Staff
0E7711AE7	Cove, Napa	Self	11/05/2023	-	566	1	M. Sutton-Dement

Number of Persons: 1
Number of Households: 1

The **Client Detail** table below offers a drill-down feature where you can click into the **Unique Identifier** and the **More Info** Column as shown in red below.

- The **Unique Identifier** directs users to the client profile screen in Clarity Human Services.

Client Detail													
Unique ID	Client Name	Relationship to HoH	Start Date	Exit Date	LOS	Expected Annual Assessment Count	Completed Annual Assessment Count	Last Annual Assessment Date	Last Annual Assessment Status	Next Annual Assessment Due	Next Annual Assessment Status	Assigned Staff	More Info
0E7711AE7	Cove, Napa	Self	03/01/2024	-	449	1	0	-	Past Due	03/01/2026	Not Due	M. Sutton-Dement	More Info
38F608B67	Peak, Berryessa	Self	01/01/2024	-	509	1	0	-	Past Due	01/01/2026	Not Due	M. Sutton-Dement	More Info

Number of Persons: 2

- **The More Info:** Drill Down will open a new table which includes the following information: Annual Assessment Due, Status, Completed Date.

Annual Assessment Overview

Program Enrollment -> Assessments Page

List of Annual Assessments

Annual Assessment Due Date	Status	Completed Date
03/01/2023	Completed Out of Range	06/01/2023

Count of Expected Assessments: 1
Count of Completed Assessments: 1

For Troubleshooting Guidance & Details on the following below, please refer to rest of the article [here](#).

1. Anniversary Date Considerations
2. Exited Programs
3. Valid Assessment Windows
4. Changing the Head of Household (HoH)
5. Deleted Assessments
6. Example: Completed Before Anniversary

7. Example: Different Assessment Counts Between HoH and Household Member Scenario

Head of Household (HoH)

Completed annual assessments for:

- 04/01/2023
- 04/01/2024
- 03/04/2025 (within ± 30 days of the 2025 anniversary)
- **Result:** All three anniversaries (2023, 2024, 2025) are counted as **Expected** and **Completed**.

Household Member:

When the report is run on 3/6/2025, annual assessment counts may differ between the Head of Household (HoH) and household members, even with the same program start date (04/01/2022). This is due to differences in assessment completion

- No assessments for 2023 or 2024
- 2025 anniversary is within 30 days (i.e., due), but no assessment exists
- **Result:** Only the 2025 anniversary is counted as **Expected**, and it is marked as **Past Due**

Note: Even though clients share the same start date, the assessment counts may differ for each household member, as only those completed within ± 30 days of each anniversary date are counted in the totals.

Exclusions and Caveats

- Household members with a Project Start Date occurring after the relevant anniversary date are not yet required to complete an annual assessment.
- Annual Assessments with an Information Date that falls after the report end date will be excluded from the dataset.

Questions? Your HMIS Administrator is happy to help.

Phone: 415-429-1400
Email: marin@bitfocus.com



Bitfocus, 5940 S Rainbow Blvd, Ste 400 #60866, Las Vegas, NV 89118, United States, 800-594-9854

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