HMIS Part 2 User Training- Clarity HMIS Software

Welcome to the HMIS Part 2 Clarity Training! This training is required for all users and must be completed before your Clarity HMIS account is created by 211OC Staff.

This training will take you through the data entry process and functionality of our new HMIS software, Clarity.

Throughout the training you will see links to the Clarity Knowledge Base. Please make sure to click on these links and read the article, as the quiz at the end of the lesson may include questions based on information in the Knowledge Base article.

This training should serve as an ongoing resource. When you receive your Clarity HMIS account login information, you should log back in to this training to help you complete your HMIS data entry.

If you would like to access the Clarity training site so you can follow along in HMIS as you complete the training, please request your agency's user name and password from your Agency Administrator. You can access the Clarity training site here. Please do not enter any real client information in the Clarity training site.

Contents

Lesson 1 - Introduction to Clarity Software

Check out Clarity's extensive Knowledge Base! While 211OC updates our HMIS Help Desk Knowledge Base during this transition period, Clarity's Knowledge Base is a great resource with detailed articles and instructional videos about HMIS functionality.

Once you have received your Clarity user ID, a link to the Clarity Login page is available at ochmis.org. Please note that the Clarity Login button will not be available until our scheduled "Go Live" date of 4/5/18. Please note, only real client information should be entered in the Clarity live site. Please do not enter fake clients into the live site.

HMIS Computer Requirements

- Password protected screen savers must be automatically enabled to lock after a maximum of ten minutes of inactivity.
- Users will be automatically logged off of HMIS after a period of inactivity.
- Written information pertaining to user access should not be stored or displayed in any publicly accessible location. Meaning, do not write down your HMIS user name and password and display this information at your desk. Please commit this information to memory for the security of your clients.
- Use one of the following browsers:
    - Microsoft – Internet Explorer
    - Mozilla – Firefox
    - Google – Chrome
    - Apple – Safari

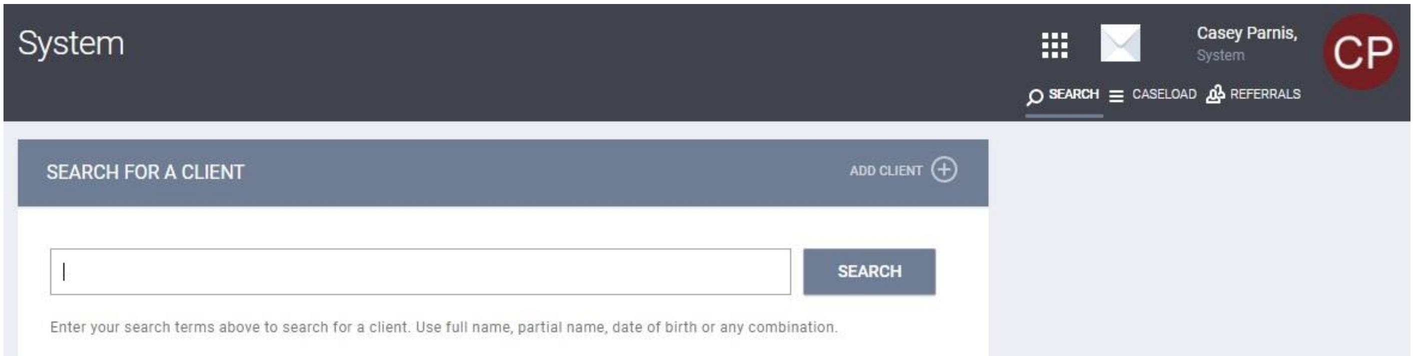
Lesson 2 - Adding a New Client

Searching For A Client

When you log in to HMIS you will begin on the Search page where you can search for clients by their first name, last name, Social Security Number, or Date of Birth. Before creating a new client, you should search by any of these identifying pieces of information to make sure that the client does not already have a record in HMIS.

If the client already has a record in HMIS, you can click on the result in the Search bar to go to the client's record and make any necessary edits before enrolling the client into your project.

Click here to read Clarity's Knowledge Base article about using the Search bar.



Adding a New Client Record

After you have searched for your client and confirmed that they do not have an existing record, click on the "ADD CLIENT" link on the right side of the Search bar. You will be taken to the Client Profile creation page. You will fill out each field on the page and then click the "Add Record" button at the bottom to save your client's record.

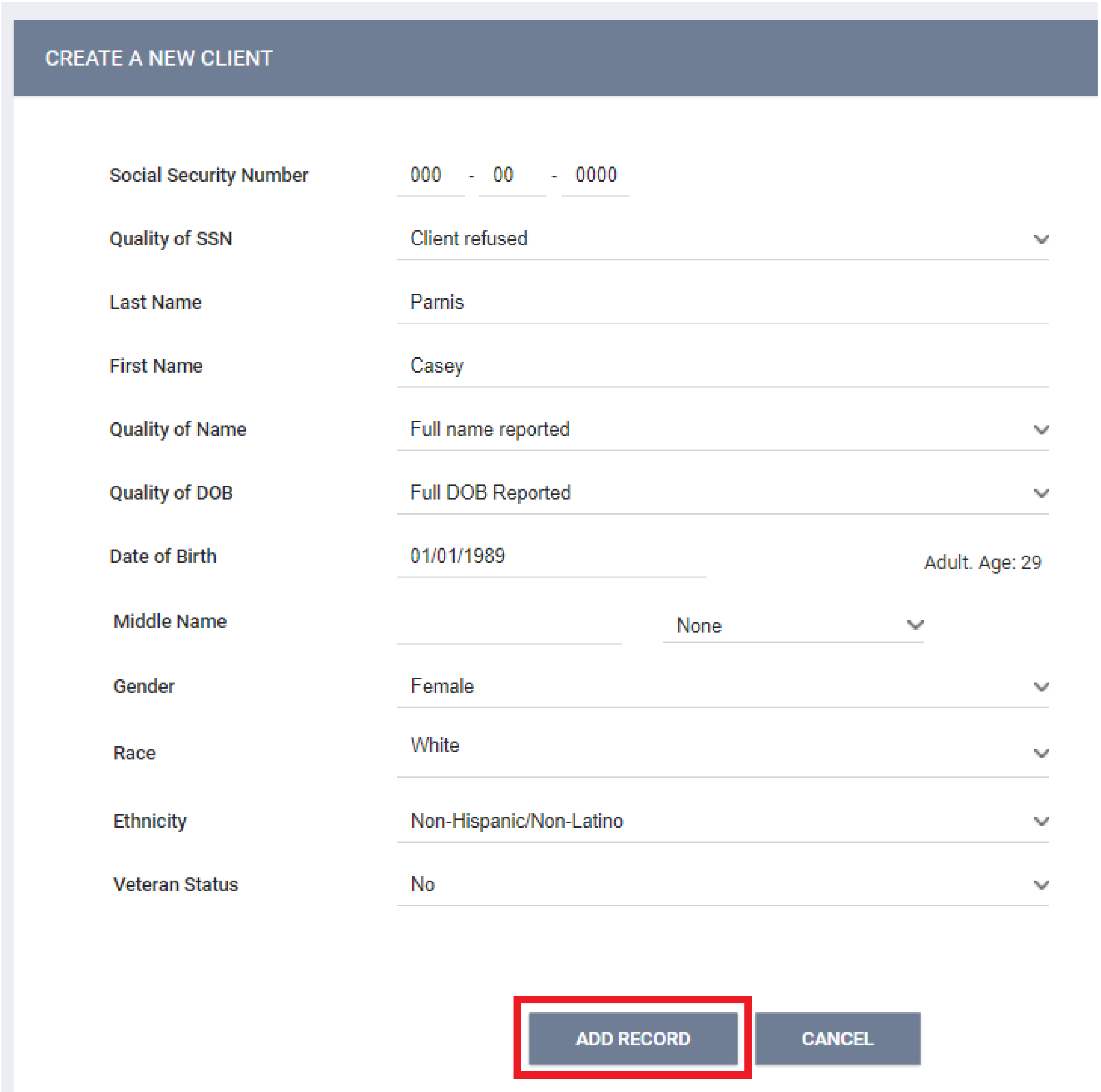
Identifying client information, like Name, Date of Birth, and Social Security Number, should be entered for the client if the client has provided it, whether or not the client signed a client consent form. Client consent is not required in order for identifying information to be entered into HMIS if only the agency working with the client has access to the data. Please see the Release of Information lesson for information on setting sharing permissions for the client.

If you do not have your client's Name, Date of Birth, or Social Security Number leave the field blank and answer the Quality of Name, Quality of DOB, Quality of SSN according to the reason the information is missing:

- **Client Doesn't Know** - Use this response if the client does not know their Name, Date of Birth, or Social Security Number.
- **Client Refused** - Use this response if the client refuses to give their Name, Date of Birth, or Social Security Number.
- **Data Not Collected** - Use this response if you do not ask the client for their Name, Date of Birth, or Social Security Number.

*****NOTES*****

- ***Last Name comes before First Name in the Create a New Client form.***
- ***If Client Doesn't Know, Client Refused, or Data Not Collected is selected for Quality of SSN, the SSN should be 000-00-0000.***



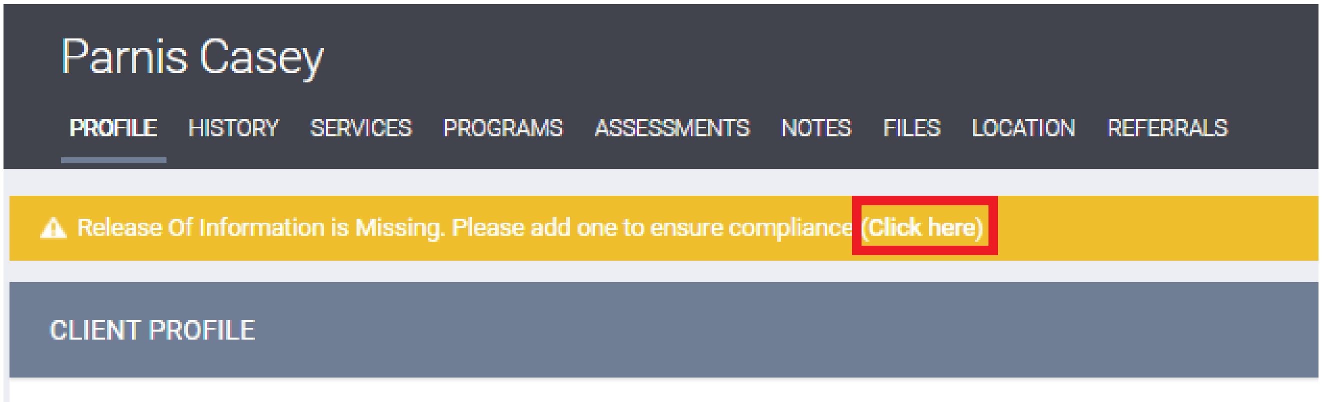
Once you have saved your client's record, a yellow ribbon will appear at the top of the screen that takes you to the Release of Information section. Continue on to the next lesson to learn how to complete a Release of Information!

Lesson 3 - Release of Information

Click here to read Clarity's Knowledge Base article on Releases of Information!

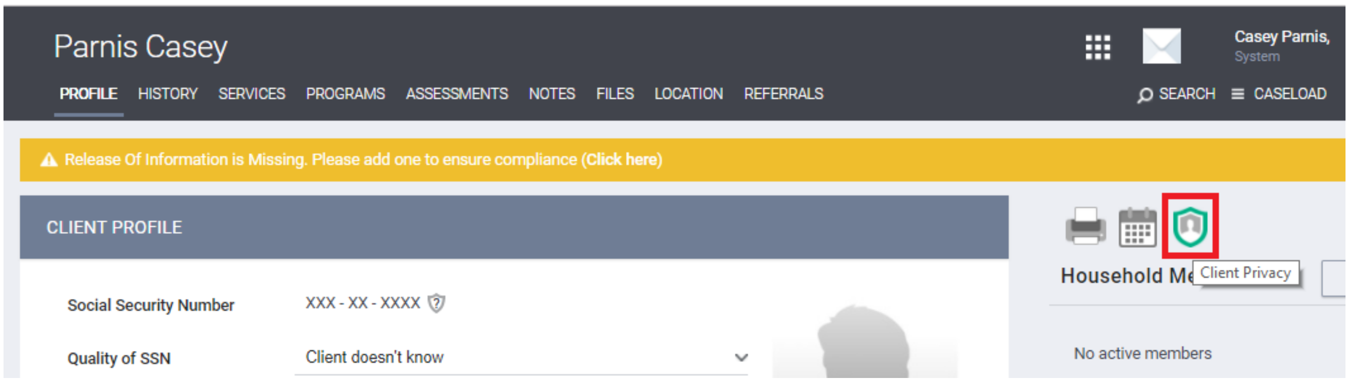
There are two ways to access the Release of Information page:

From the yellow ribbon that appears when a new client record has been created:

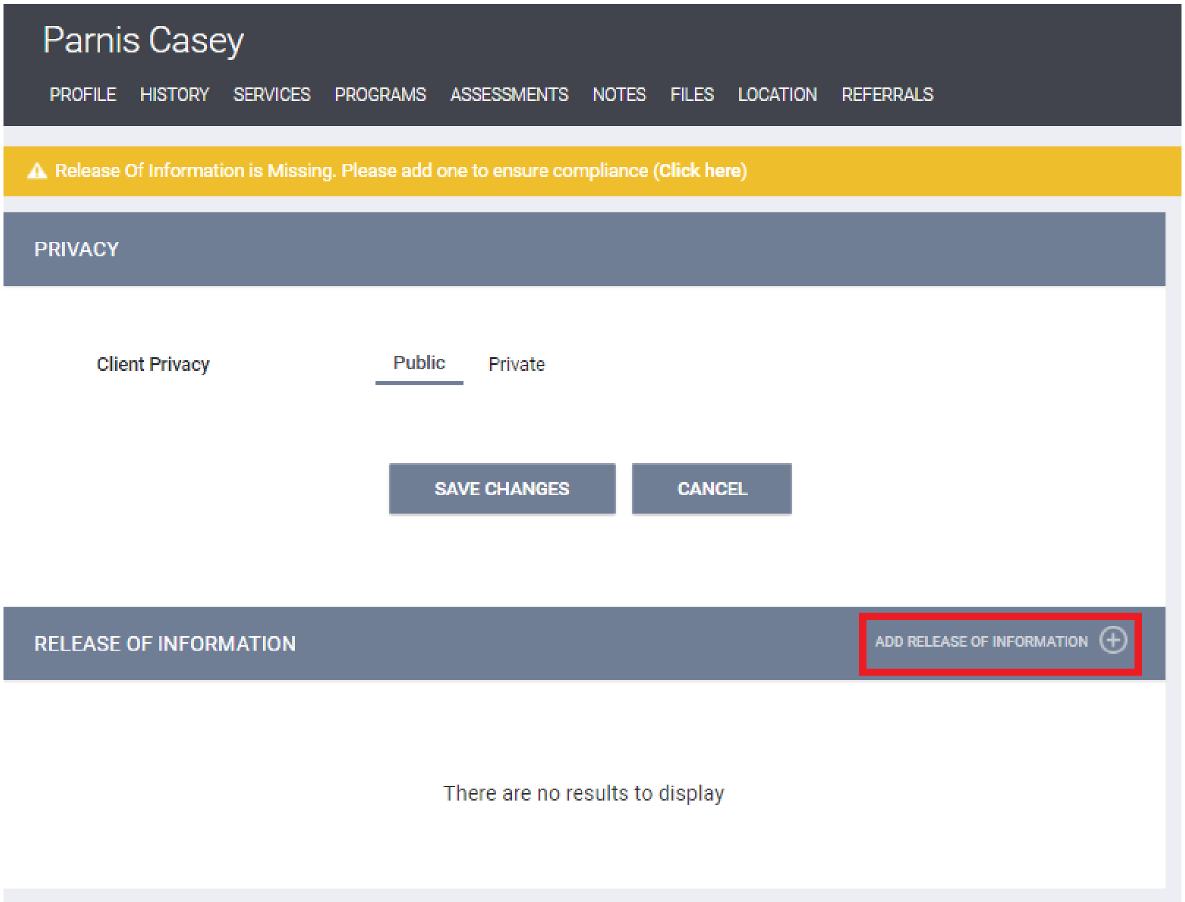


Clicking this link will take you directly to the Release of Information page.

From the Client Privacy button on the Profile tab:



Clicking this link will take you to the Privacy page. Click on the "Add Release of Information" button to go to the Release of Information page.



Release of Information

This page is used to document whether or not the client gave their consent to have their personal information shared with other agencies in HMIS. Complete the fields on this page.

Please note, unaccompanied minors (a single client age 17 or under, or a household where all clients are 17 or under) CANNOT consent to share their personal information in HMIS. In this case, Permission should be set to No, and Client Privacy must be set to "Private."

Permission

- Yes - Client provided consent to share their information in HMIS
- No - Client did not provide consent to share their information in HMIS

Start Date

This is the date that the client signed the ROI. The *Start Date* defaults to today's date, but it must be configured to reflect the actual date the ROI was signed by the client, if it was not signed on the current day.

End Date

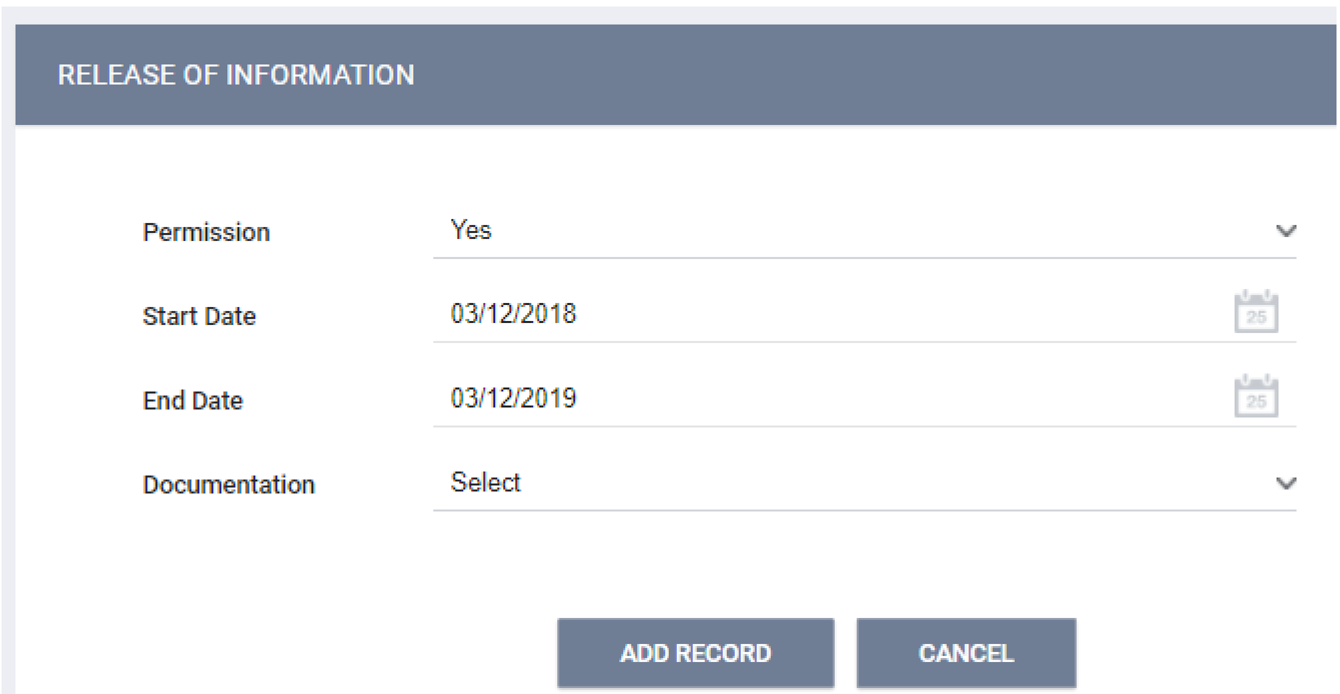
This is the date that the ROI will expire. It will default to the expiration date configured by the HMIS System Administrator.

Documentation

Enter the way in which the ROI was stored. There are several options listed:

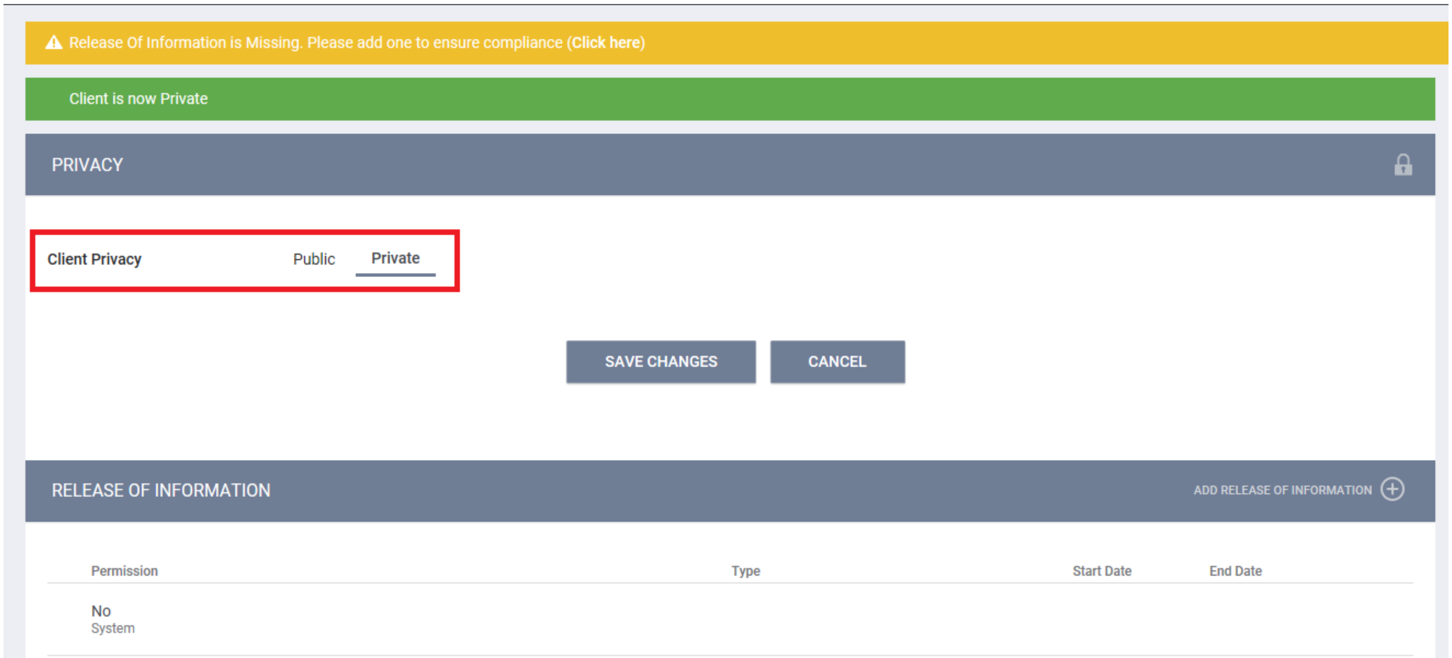
- Electronic Signature - If Electronic Signature is selected, a black button stating *e-Sign Document* will be present. Click on it to complete the electronic signature form. The client can sign the form with their finger or stylus if your agency has purchased a signature pad, or using the computer's mouse if your agency does not have a signature pad. If this method is used, 211OC highly recommends that you print a PDF copy of the signed form from Clarity and add it to your client's paper file in case of an audit.
    - For households with minor children, have the adult guardian e-sign for the minor child.
- Attached PDF – This will prompt the end user to upload the PDF, which must be the Consent To Share Protected Personal Information form.
    - For households with minor children, make sure the attached PDF contains the minor children's information. You will need to upload the document for each minor child in the household.

Once you have completed all of the fields, click the "Add Record" button.



Privacy:

Once the Release of Information data has been saved, you will see the client's current Privacy setting. This field defaults to Public for all clients. This means that any agency with access to HMIS will be able to view the client's profile and any project enrollments the client has, although they won't be able to add or edit any data to enrollments that their agency doesn't "own". If the client did not give permission for their data to be shared in HMIS, the Privacy field should be changed to Private, which means that only your agency will be able to view the client's profile and enrollment.



Lesson 4 - Creating and Managing Household Members

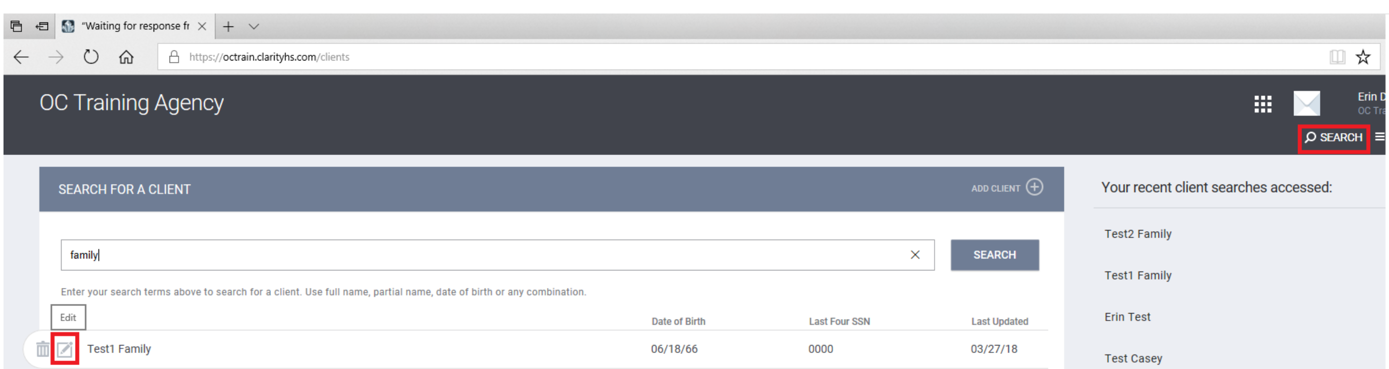
Click here to read Clarity's Knowledge Base article on creating and managing household members.

A household is a single individual or a group of persons who apply together to a project for assistance and who live together in one dwelling unit, or, for persons who are not housed, who would live together in one dwelling unit if they were housed. In Clarity, clients must be added or removed from a household prior to enrolling the household in a project in order for the clients served by the project to be reported correctly.

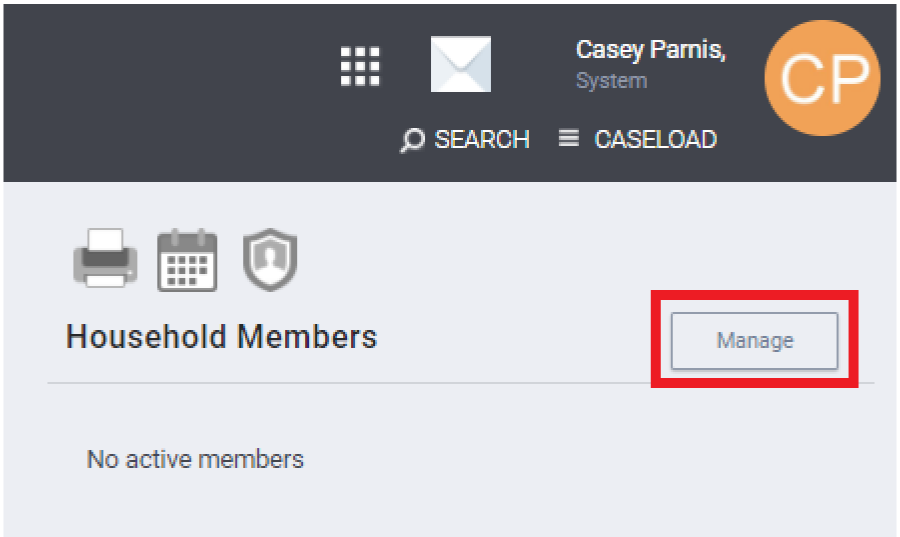
Adding a Client to a Household

In Clarity, each client has their own client profile. You should search for and update or create a new client profile for each member of a household using the procedure outlined in the "Adding a New Client" lesson.

To join clients to a household, search for the client you want to set as head of household, and click on Edit.

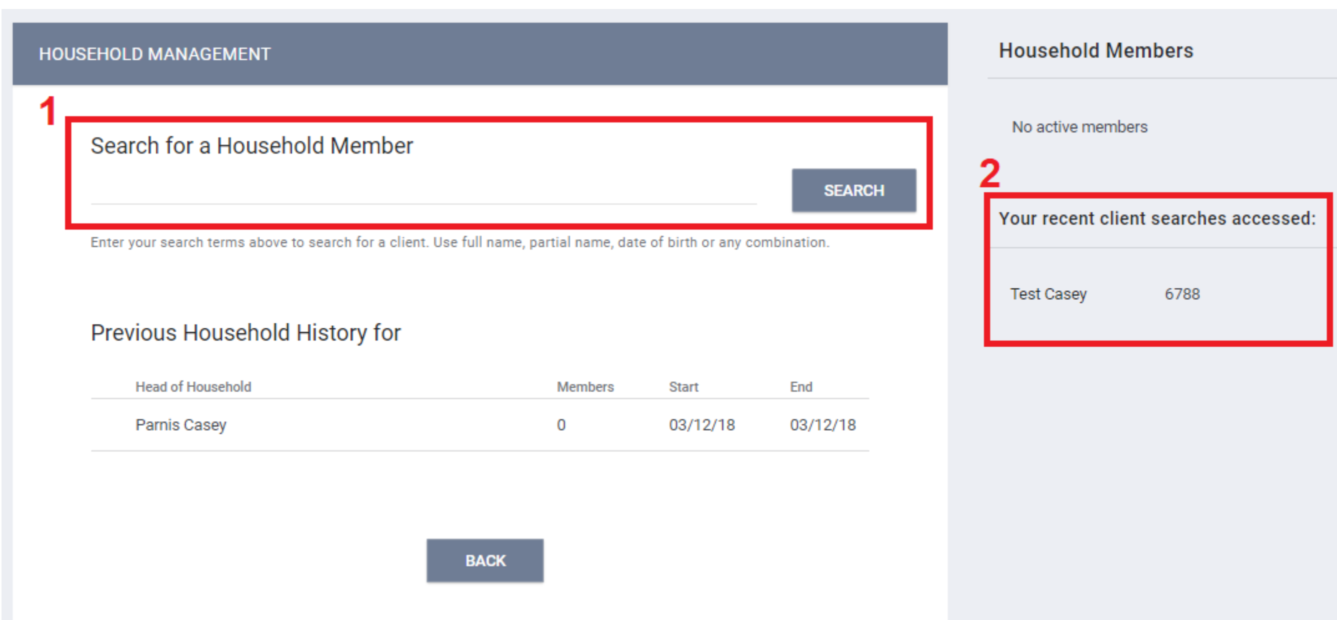


Then, click on the "Manage" button.



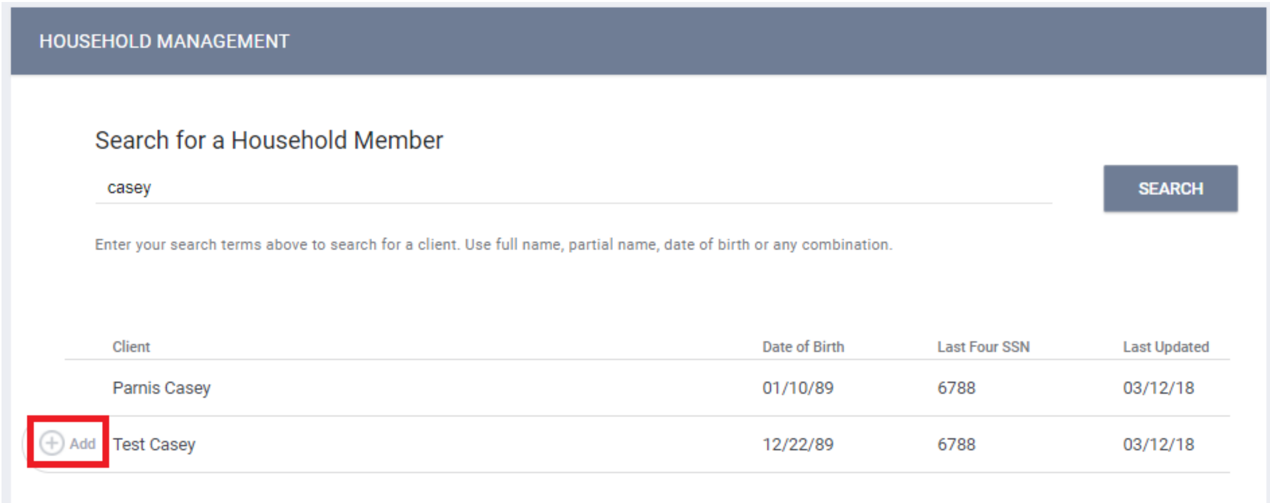
There are two ways to add a client to a household:

1. Client Search
2. Quick Add/Join Functionality from the Side Bar: Within the right sidebar, your 10 most recently accessed clients will appear under the section titled *Your recent client searches accessed*. If you have created records for each household member at the same time these records will all appear in the sidebar.



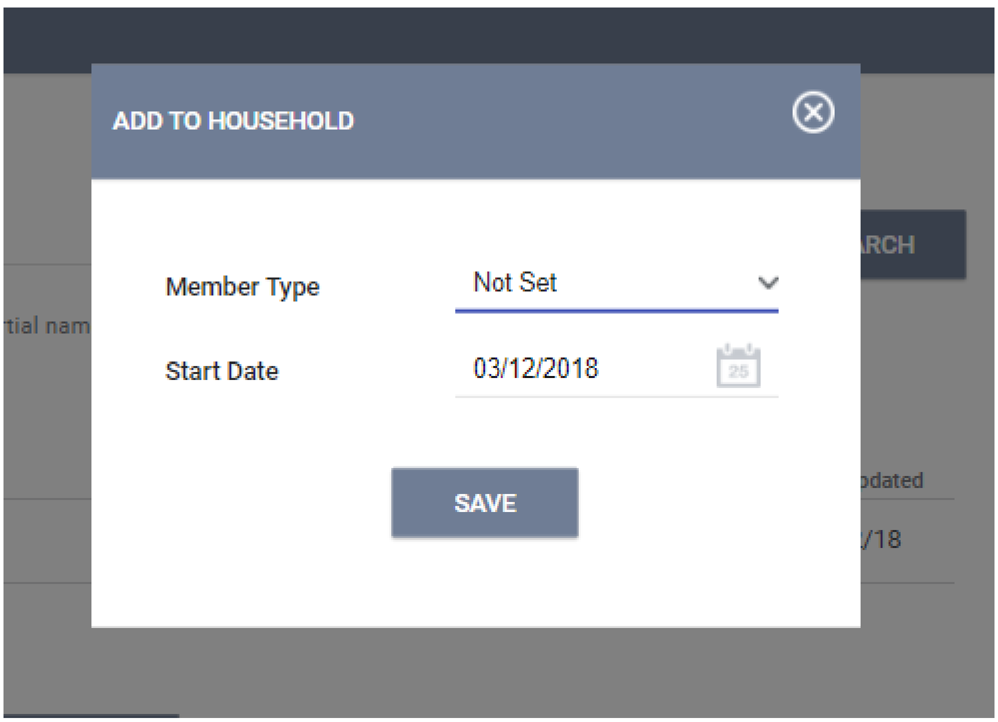
Add:

Clients that currently are not members of any Family/Household will be listed with the *Add* option which looks like a plus sign when you hover over their name. This is the most common scenario when adding members to a Family/Household.



Selecting *the plus icon* will display a window requesting a Member Type and Start Date. Select the Member Type, enter a Start Date, and then select *Save*. This client will be successfully added to the family/household.

- Member type: The relationship between the client being added to the household and the head of household.
- Start Date: The date that the client became associated with the household. Usually this will be the project start date if all clients are entering together. If you are adding a client to a household after the head of household and other members have already entered the project, use the date that the client is being added to the household.



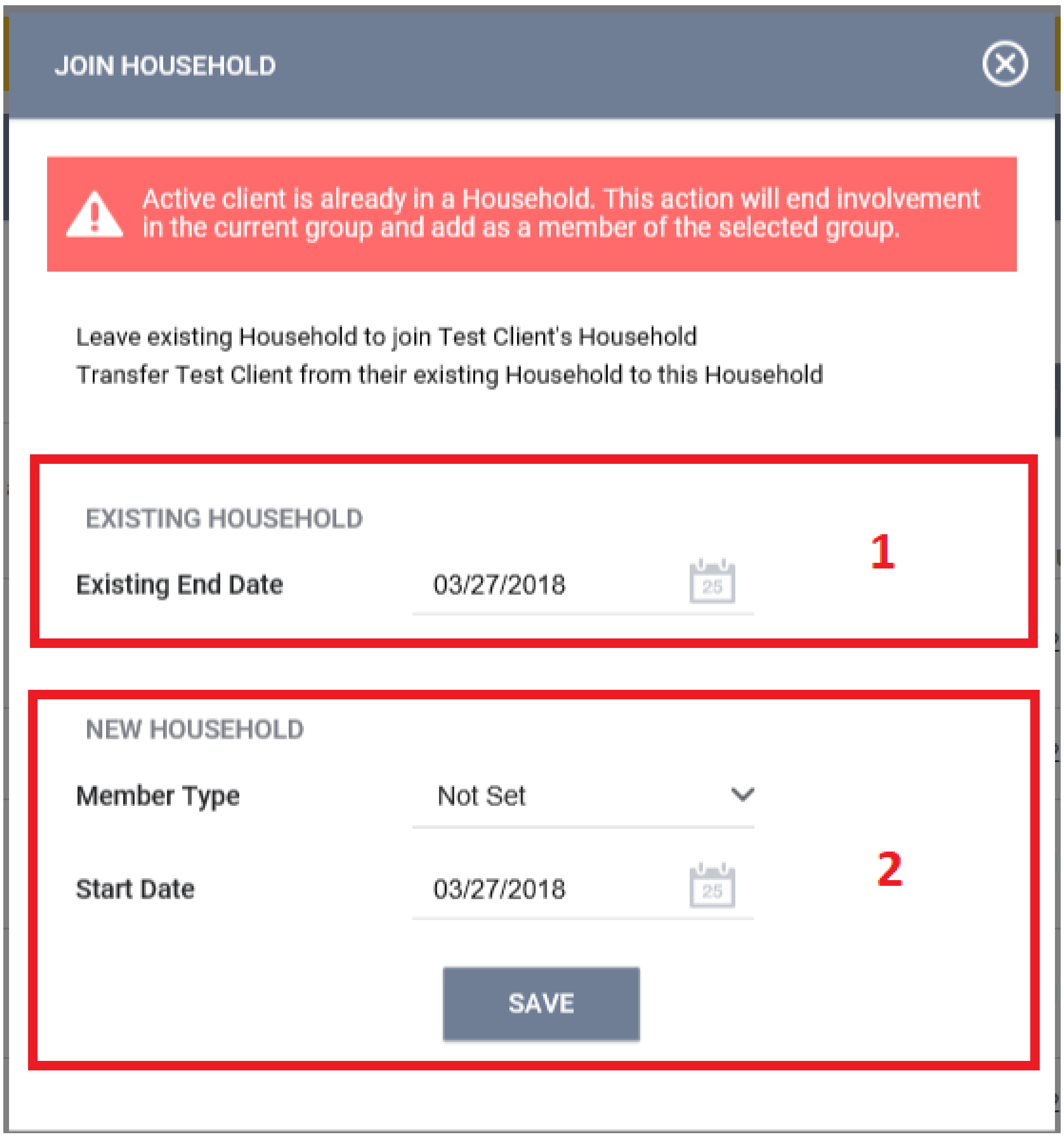
Join:

Some clients have a *Join* icon that looks like merging arrows button rather than a plus icon. This means that client is already a member of a different household. The "Join" function is used when you need to add a client to your household from an already existing household. There are two scenarios that can result from this:

Scenario 1: The head of household does not have any household members. In this case, he or she can join an existing household by clicking the Join button, and entering the Member Type and Start Date.

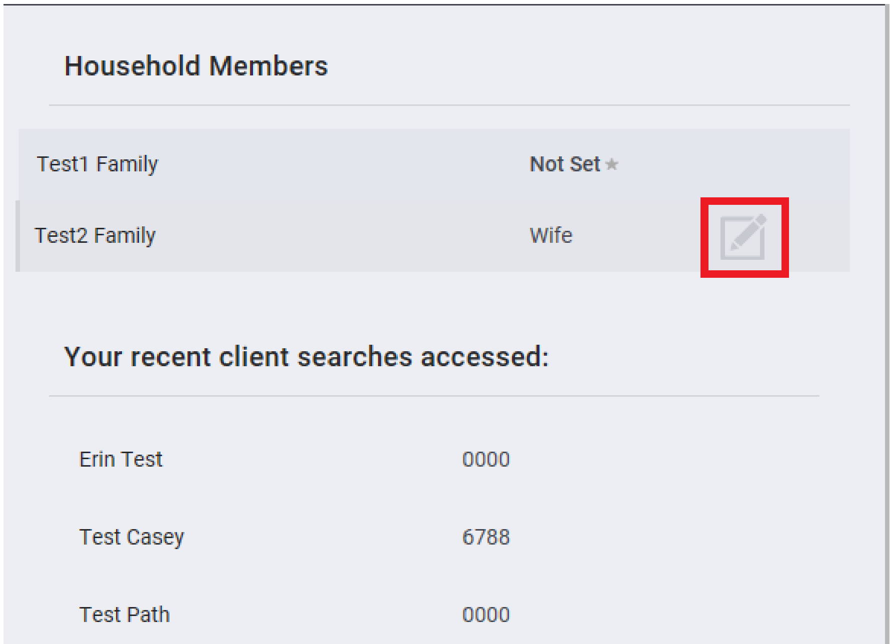
Scenario 2: The head of household is already a member of a household. In this case, he or she can either:

1. Leave their household and join an existing household (this should only be used if the head of household is enrolling with all of the other clients in the existing household)
   - If using this option, enter the date the head of household should be removed from their current household in the Existing End Date field (should match the client's entry into your project)
2. Transfer a client from an existing household into their household
   - If using this option, enter the Member Type and the Start Date for the client being added to the household

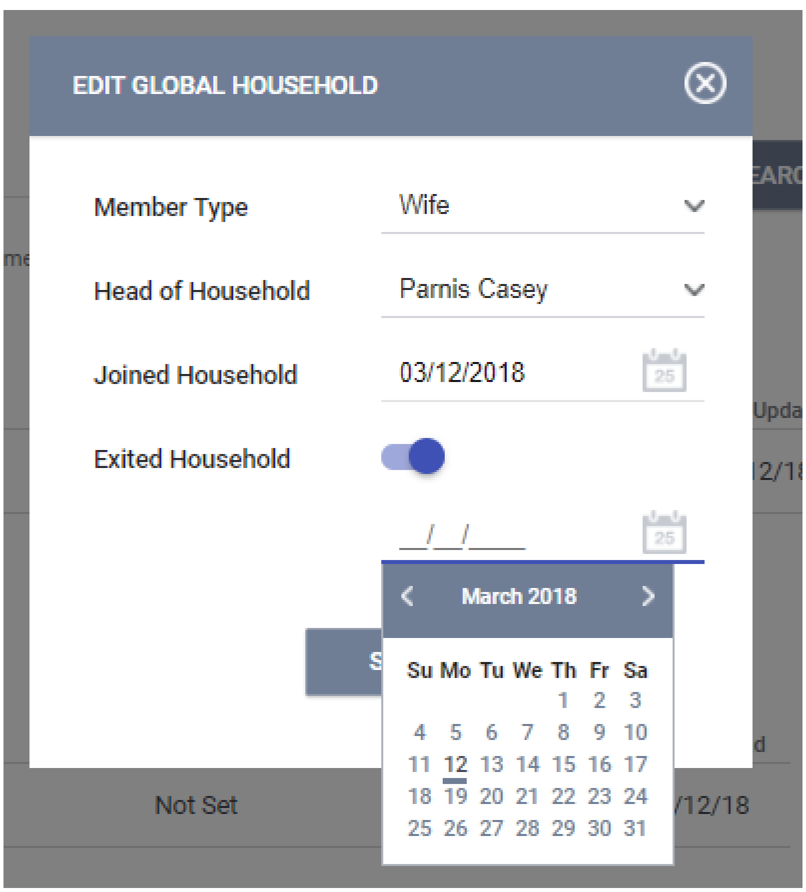


Removing a Client From a Household

A client should be removed from a household if they are not being served by your agency. If a client needs to be removed from a household, search for the client, and click on Edit. Click on the "Manage" button, then click on the Edit button next to the client's name under the Household Members section.



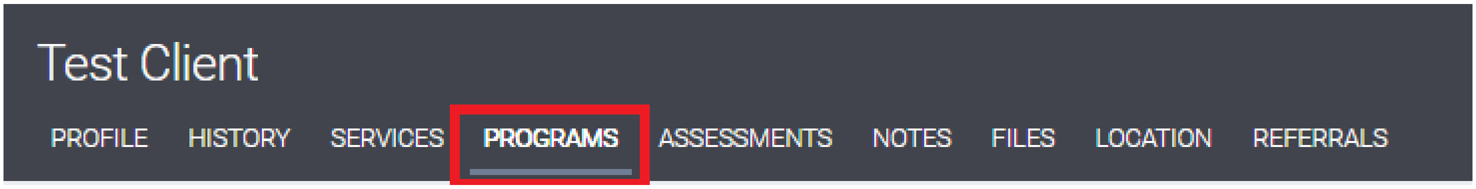
A popup box will appear. Click the *Exited Household* switch and, in the *End Date* field, enter the date you wish to stop the client's participation in the household. The client will be considered a member until that date. After the date has passed, the client will automatically be removed from the household and listed in the Family/Household History section. Click Save.



Lesson 5 - Enrolling Clients in a Project

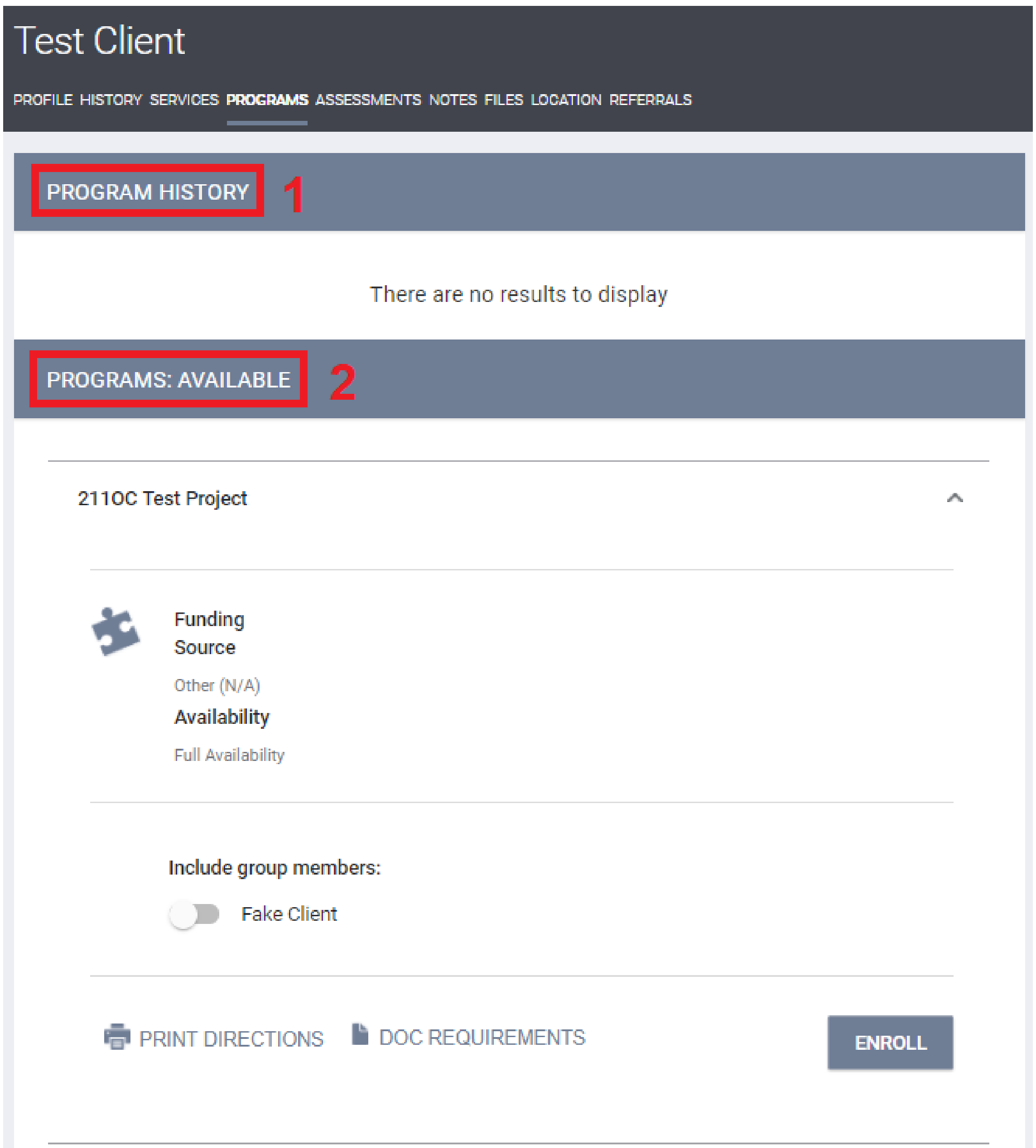
Click here to read Clarity's in depth Knowledge Base article on enrolling clients in project!

To begin the project enrollment process, search for your client, click on Edit, and click on the Programs tab:



On the programs page you will see two sections:

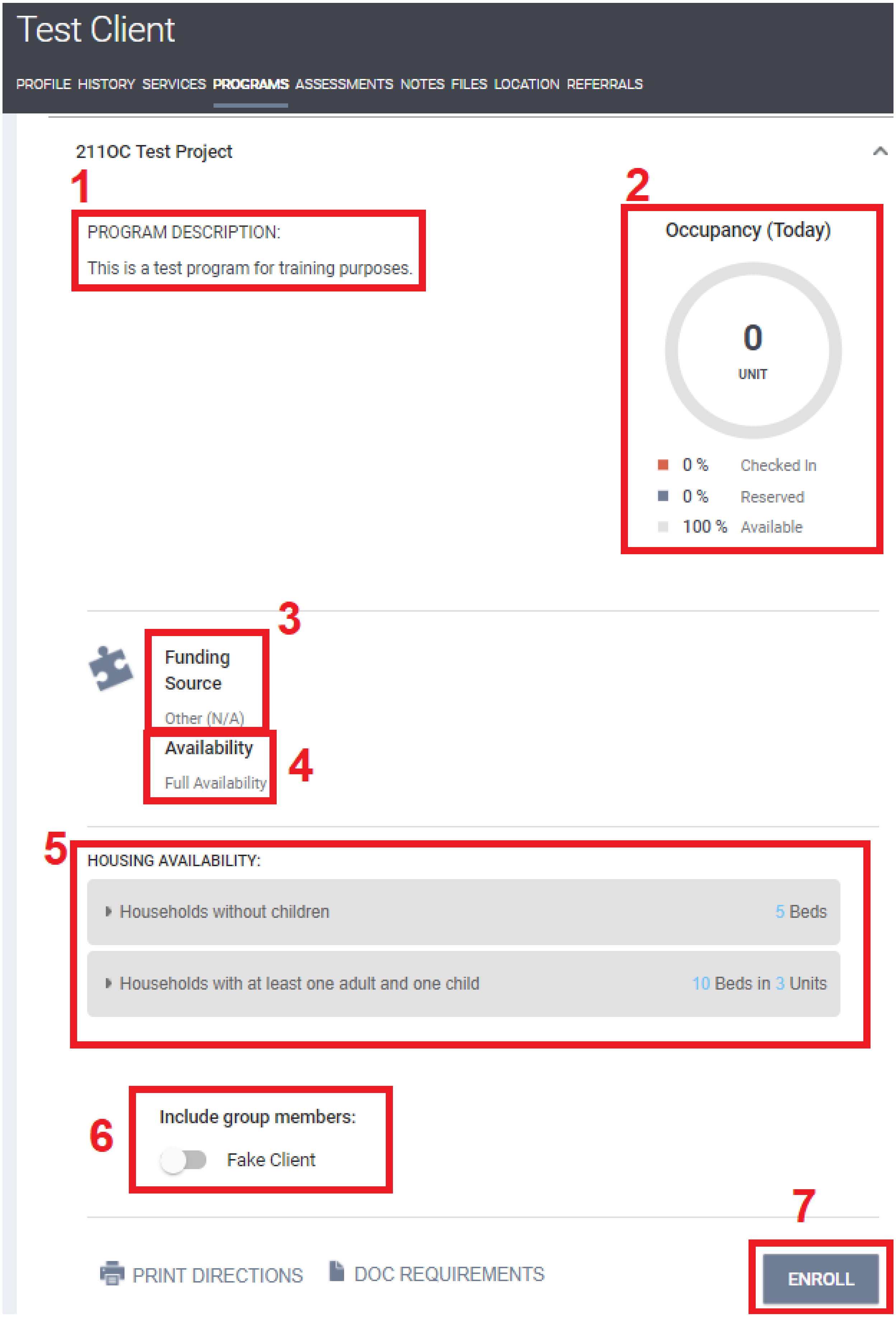
1. Program History
2. Programs: Available



In this example, the **Program History** section is blank because this test client has not been enrolled in any programs before. When you are working with clients who have previously been enrolled in a program, you will see any previous enrollments the client has had in any program in the Orange County CoC. Next to each previous program enrollment will either be an Exit Date if the client is exited, or the word **Active** in green if the client is still enrolled in that program.

In the **Programs: Available** section, you will see a list of programs you are able to enroll your client into. You can click on the down arrow next to the name of any program to expand the view and enroll your clients. Program information is shown in the Programs Available Section:

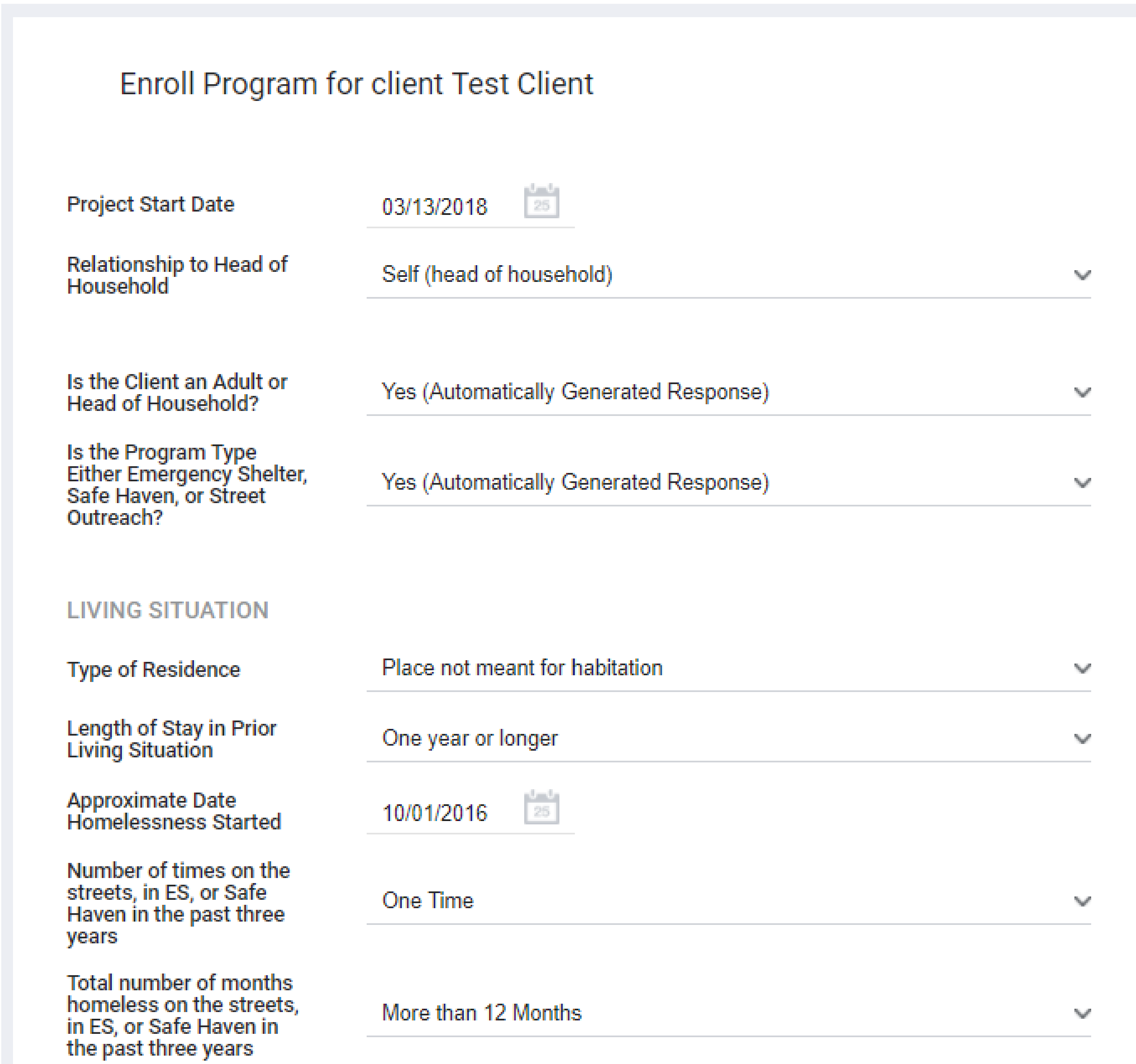
1. Program Description: A description of the program you have selected. This section will only be visible if your agency has provided a Program Description to 211OC.
2. Occupancy: Shows the number of beds/units available. This section will only be visible if the program you have selected has a program type that requires bed inventory. Bed inventory information is based on the latest HIC.
3. Funding Source: Describes the funding sources associated with the program you have selected.
4. Availability: Describes any availability restrictions on the program you have selected.
5. Housing Availability: Shows the number of beds and units available for each household type.
6. Include Group Members: Click the switch next to the name of each household member you would like to enroll.
7. Enroll Button: Clicking this button enrolls the selected clients into the program you have selected.


Test Client
PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES LOCATION REFERRALS
211OC Test Project
1
PROGRAM DESCRIPTION:
This is a test program for training purposes.
2
Occupancy (Today)
0
UNIT
0 % Checked In
0 % Reserved
100 % Available
3
Funding Source
Other (N/A)
Availability
Full Availability
4
5
HOUSING AVAILABILITY:
Households without children
5 Beds
Households with at least one adult and one child
10 Beds in 3 Units
6
Include group members:
Fake Client
7
PRINT DIRECTIONS
DOC REQUIREMENTS
ENROLL

After clicking Enroll, you will be taken to the Program Enrollment page for your *original* client. This page will present program specific data elements necessary to complete program enrollment. Fill out each data element and click Save.

Note: If you are enrolling other household/family members, there will be a Save and Next button. Selecting this will enroll the current member, and automatically take you to the correct program enrollment screen for the next member.

The first section of questions is Program Enrollment information such as Start Date and Relation to Head of Household, and Living Situation ([3.917A and 3.917B](#))



Next is Disabling Condition information. If you select "Yes" to any disabling condition question, the "Long Term" question will appear next to it.

DISABLING CONDITIONS AND BARRIERS

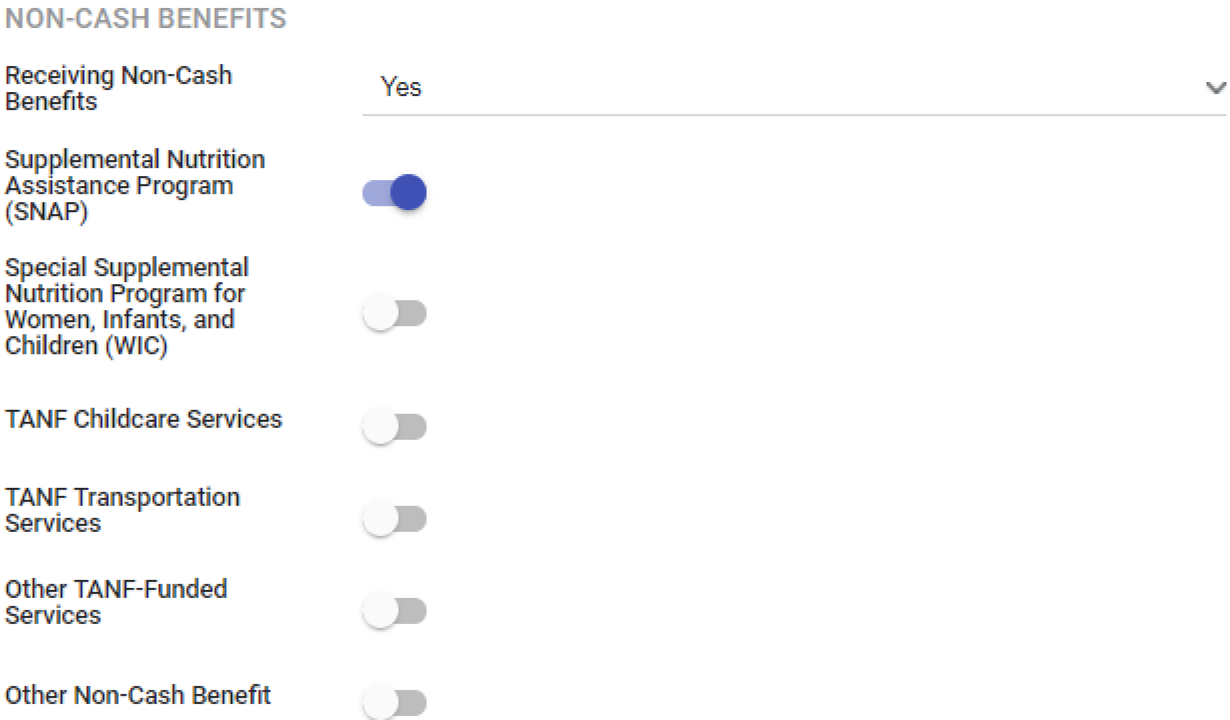
Disabling Condition	Yes		
Physical Disability	Yes	Long Term	Yes
Developmental Disability	No		
Chronic Health Condition	No		
HIV - AIDS	No		
Mental Health Problem	No		
Substance Abuse Problem	No		
Domestic Violence Victim/Survivor	No		

Next is the client's Cash Income information. If you select "Yes" for "Income from Any Source" the list of Cash Income sources will appear. Click the switch next to any Cash Income source that the client receives and enter the dollar amount that the client receives *monthly* from that income source.

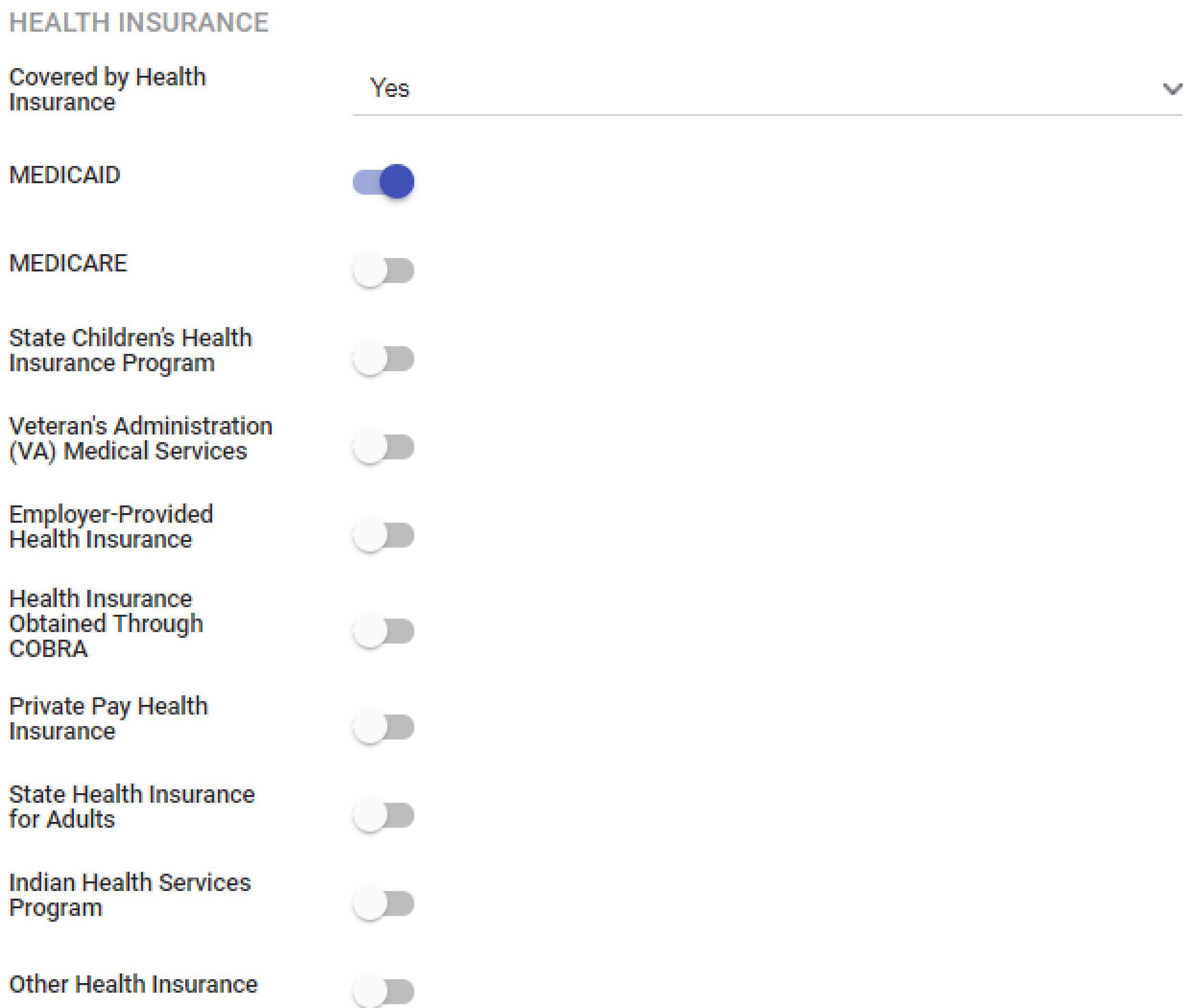
CASH INCOME FOR INDIVIDUAL

Income from Any Source	Yes	
Earned Income		
Unemployment Insurance		
Worker's Compensation		
Private Disability Insurance		
VA Service-Connected Disability Compensation		
Social Security Disability Insurance (SSDI)		Amount 100
Supplemental Security Income (SSI)		
Retirement Income from Social Security		
VA Non-Service Connected Disability Pension		
Pension or Retirement Income from a Former Job		
Temporary Assistance for Needy Families (TANF)		
General Assistance (GA)		
Alimony and Other Spousal Support		
Child Support		
Other Cash Income		
Total Cash Income for Individual	100.00	

Next is the client's Non-Cash Benefits information. If you select "Yes" for "Non-Cash Benefits" the list of Non-Cash Benefit sources will appear. Click the switch next to any Non-Cash Benefit source that the client receives.



Next is the client's Health Insurance information. If you select "Yes" for "Health Insurance" the list of Health Insurance sources will appear. Click the switch next to any Health Insurance source that the client receives.

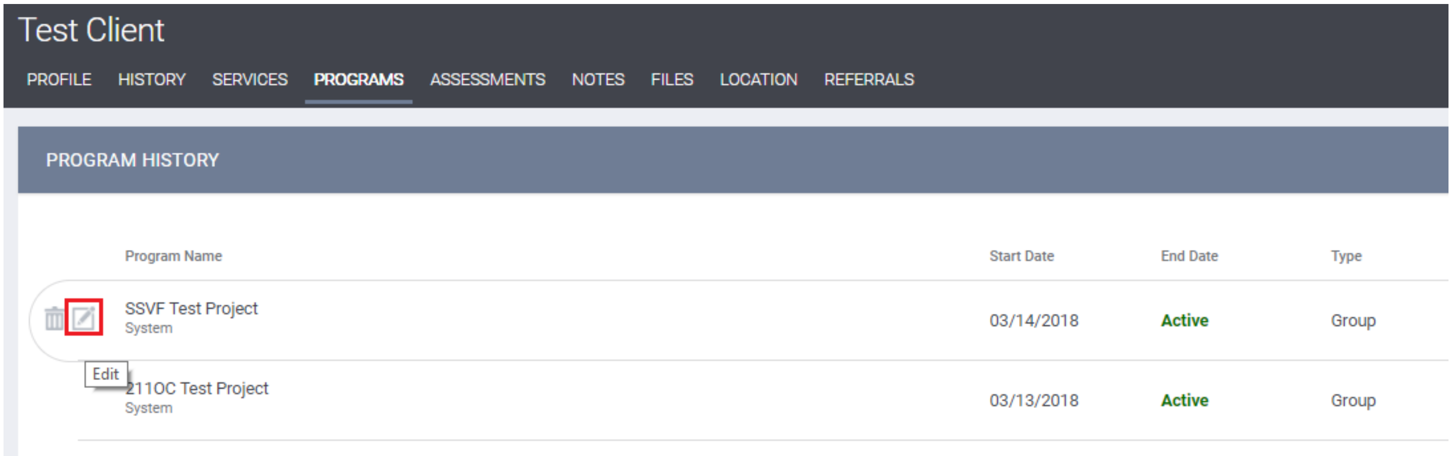


Now click "Save" if you are enrolling an individual or "Save & Next" if you are enrolling a family. If you are enrolling an individual, you are done! If you are enrolling a family, complete this process for each additional household member and click "Save."

Lesson 6 - Adding Service Items

In Clarity Services are set up as categories of services with multiple Service Items under each Service. For example, a "Food" service may have "Meal Voucher," "Bag of Groceries," and "Meal On Site" as service items that are available to provide to clients. Service items are the actual services provided to the client, and are what shows up on various reports, like APRs and CSV exports.

To add a service item to a client, search for the client you want to provide a service item to, and click on Edit. Click on the Programs tab, then click on the Edit icon that appears when you hover next to the name of the program the client is enrolled in. Please note that services can only be added to enrollments that are Active.



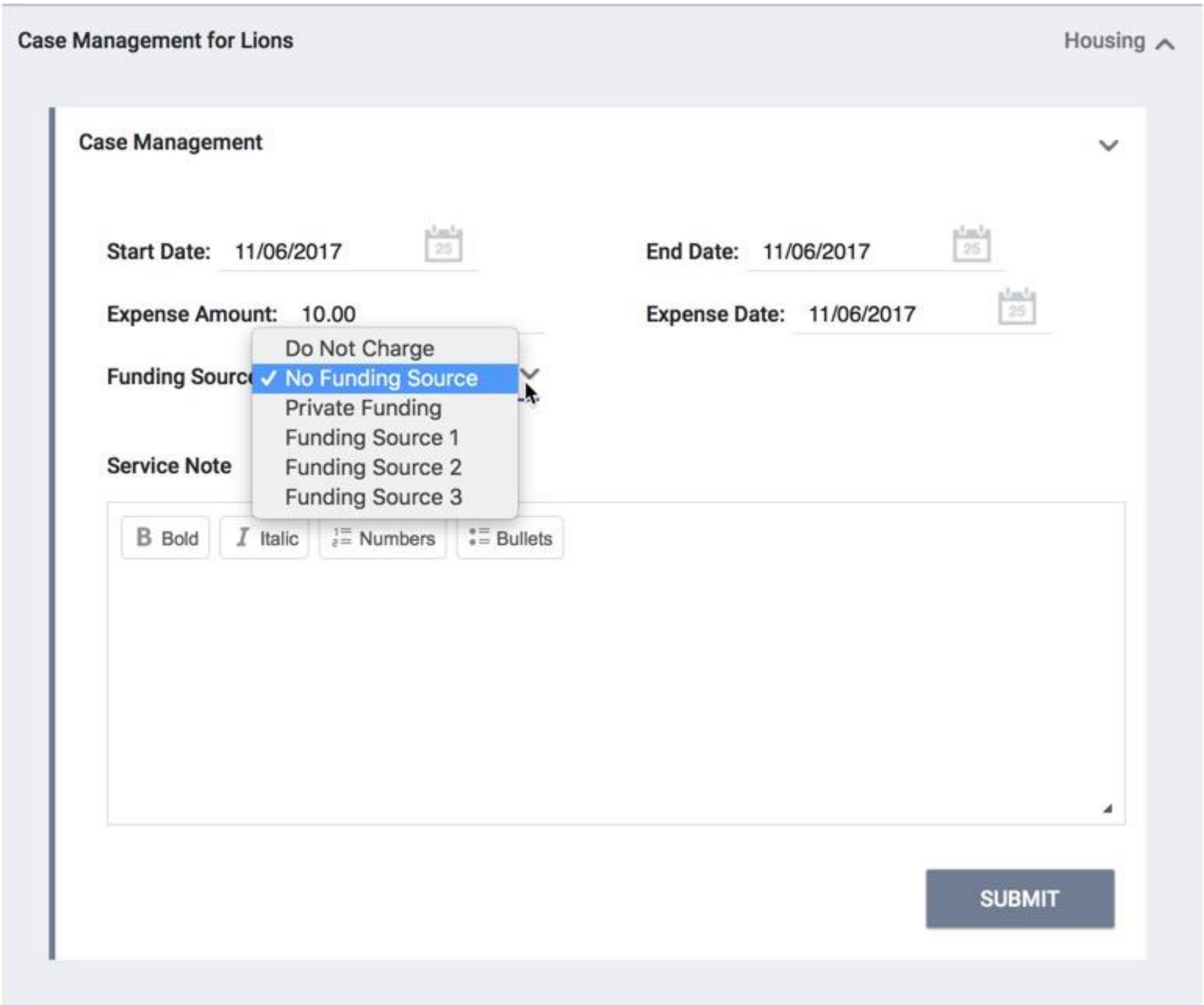
Complete the following steps:

1. Click on the Provide Services tab.
2. Select the Service you want to provide (remember that in Clarity "Service" refers to the category of Service Items available to provide, you provide "Service Items" to clients.)
3. Select the Service Item you want to provide to the client under the Service you have selected.
4. Enter a Start and End date for the service.
5. If you would like to provide the service to other members of the household, click the switch next to the appropriate names.
6. Enter a Service Note if you would like to provide information about the provision of the service. (NOTE: A service note is not a case note, it is simply information about the service you are providing.)
7. Click Submit.


Test Client
PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES LOCATION REFERRALS
PROGRAM: SSVF TEST PROJECT
1
Enrollment History Provide Services Assessments Notes Files Chart Forms
Exit
Services
2
Assistance obtaining VA benefits
VA SSVF Service
Educational assistance
3
Start Date: 03/14/2018
End Date: 03/14/2018
4
Include group members:
5
Fake Client
Service Note
Bold Italic Numbers Bullets
6
SUBMIT
7
Employment and training services
Health care services

Some service items require an "expense amount" to be added. For these service items, you will provide an *Expense Amount*, *Expense Date*, and *Funding Source*.

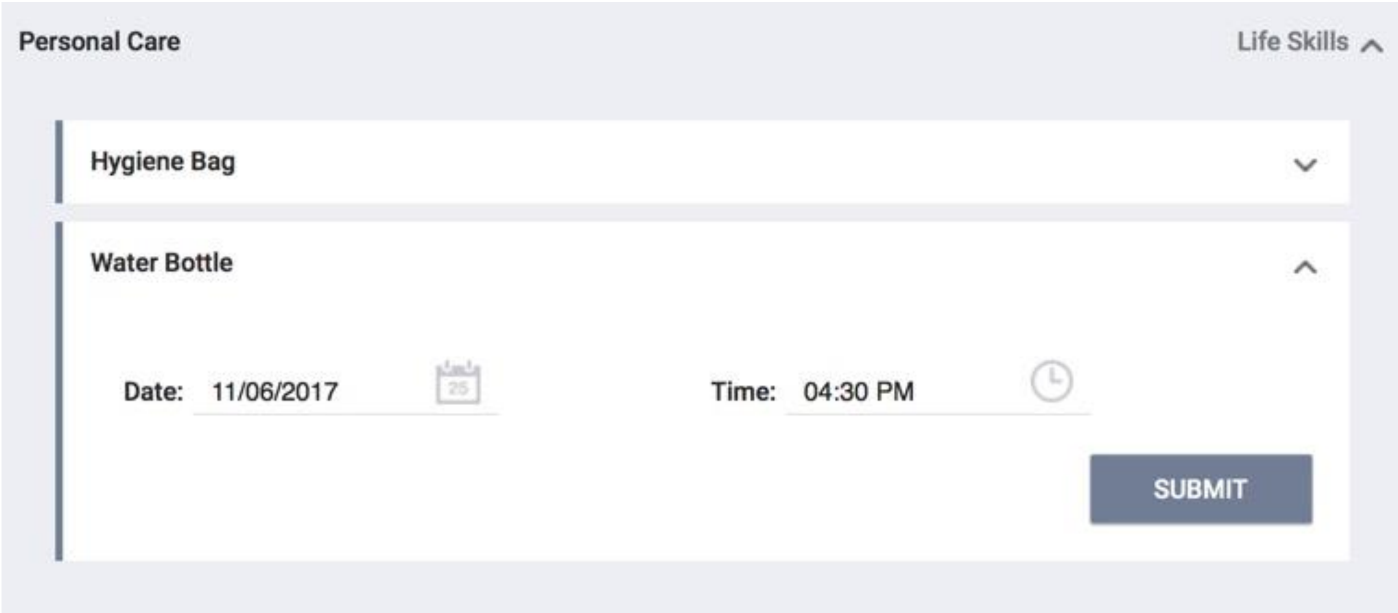
- Expense Amount - Depending on the setup of the service, this may be either an adjustable or a pre-determined amount that cannot be modified.
- Expense Date - The date the expense was issued.
- Funding Source - Depending on the setup of the service, this may be adjustable, or automatically set to a pre-determined funding source.



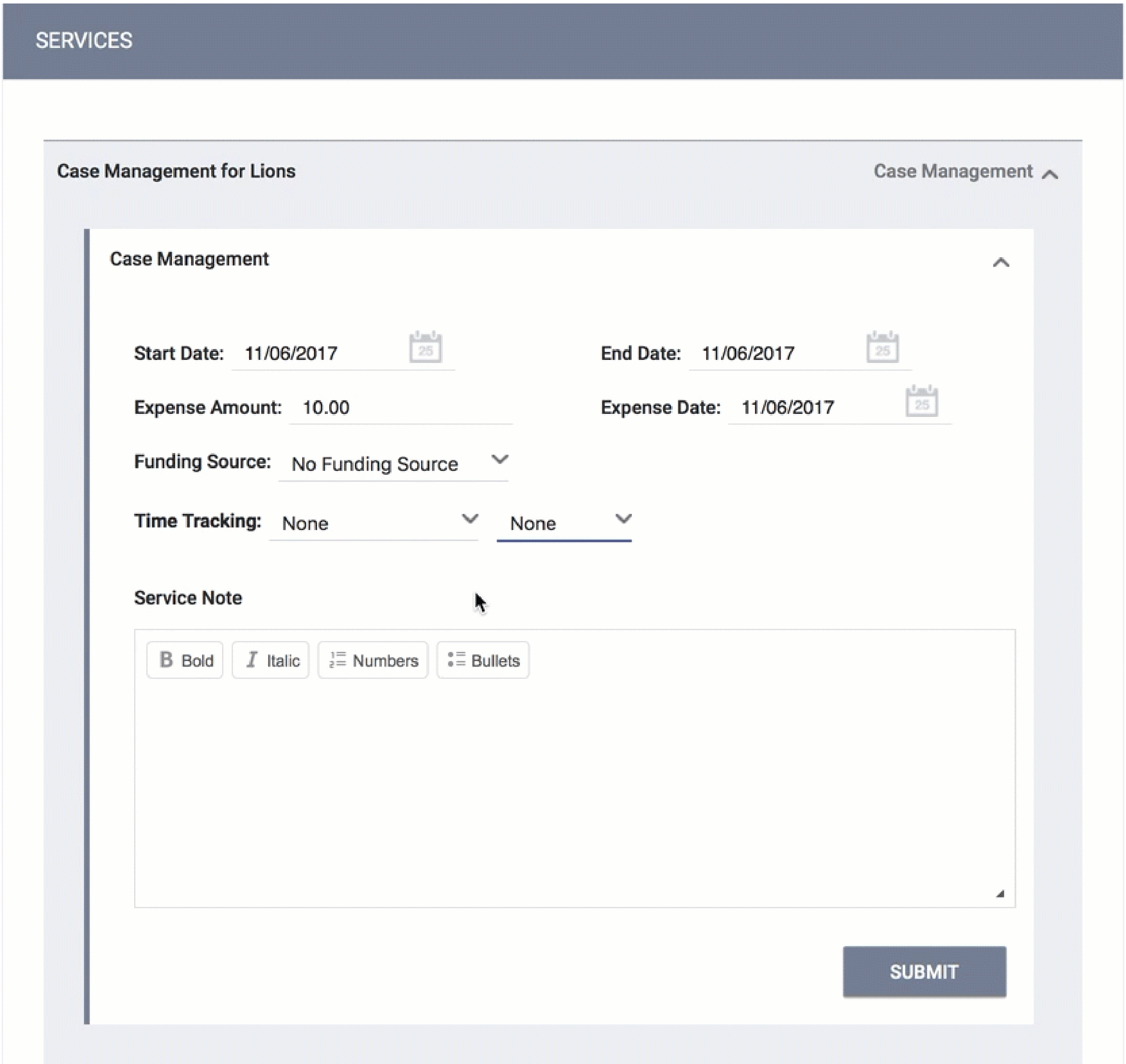
Some service items occur more than once a day and can be time-based. First, select a *Start Date*.

Note: The clock icon will only appear if the service is set up as multiple attendance.

This will open a time dialogue requesting the *Hour* and *Minute* of the service. To set the time, use the *Hour* and *Minute* dropdowns to select the appropriate time for the service.


Personal Care
Life Skills
Hygiene Bag
Water Bottle
Date: 11/06/2017
Time: 04:30 PM
SUBMIT

A service can also be time tracked. Most commonly used for the Case Management service, this function allows you to keep track of how much time you've spent on a service. Simply open up the desired service, enter the amount of time spent on it, then click *Submit*.



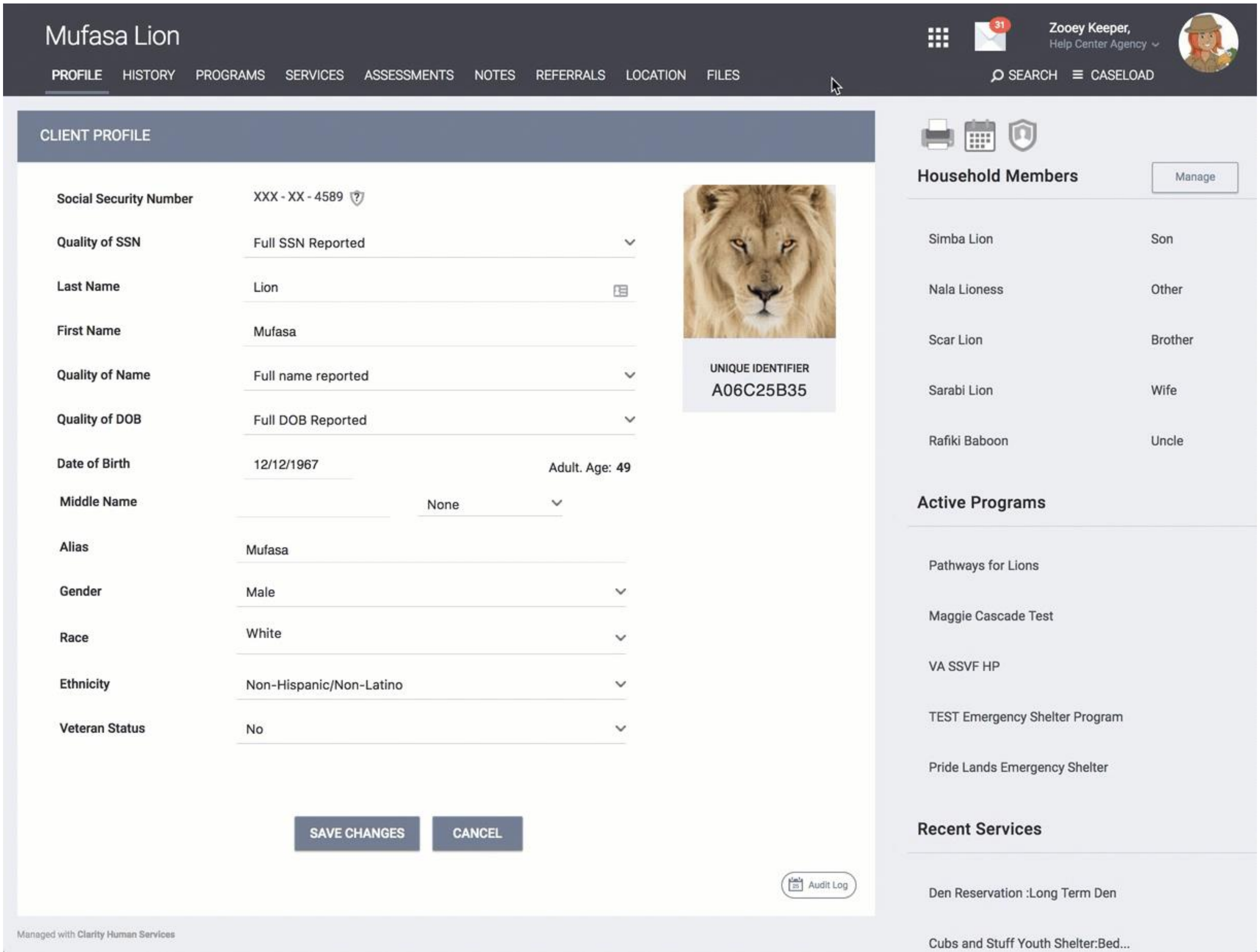
Lesson 7 - Client Notes and Public Alerts

[Click here] to read Clarity's Knowledge Base article about Case Notes, and click here to learn about [Public Alerts]!

In Clarity, Case Notes are called Client Notes. Client Notes can be added at the agency level, as well as at the project level. Please note that Client Notes reports do not include agency level notes.

Agency Level Client Notes

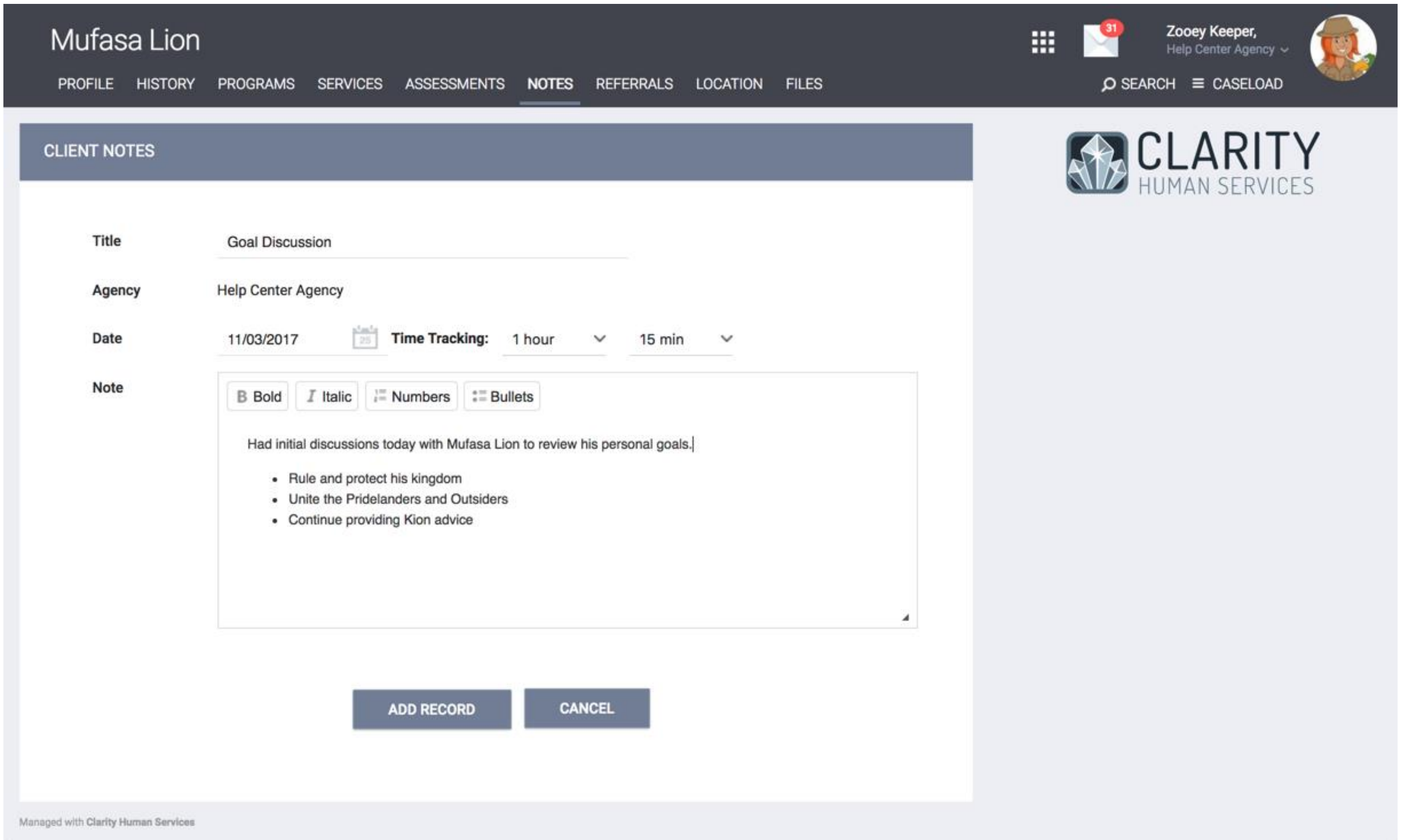
To create an agency level Client Note, select the *Notes* tab in top menu of the Client Record. From here you can add a new note by clicking *Add Note* in the top right corner of the Notes section.



Create a title for your note and enter your note in the body of the notes section. The Agency field will automatically be populated with your agency name.

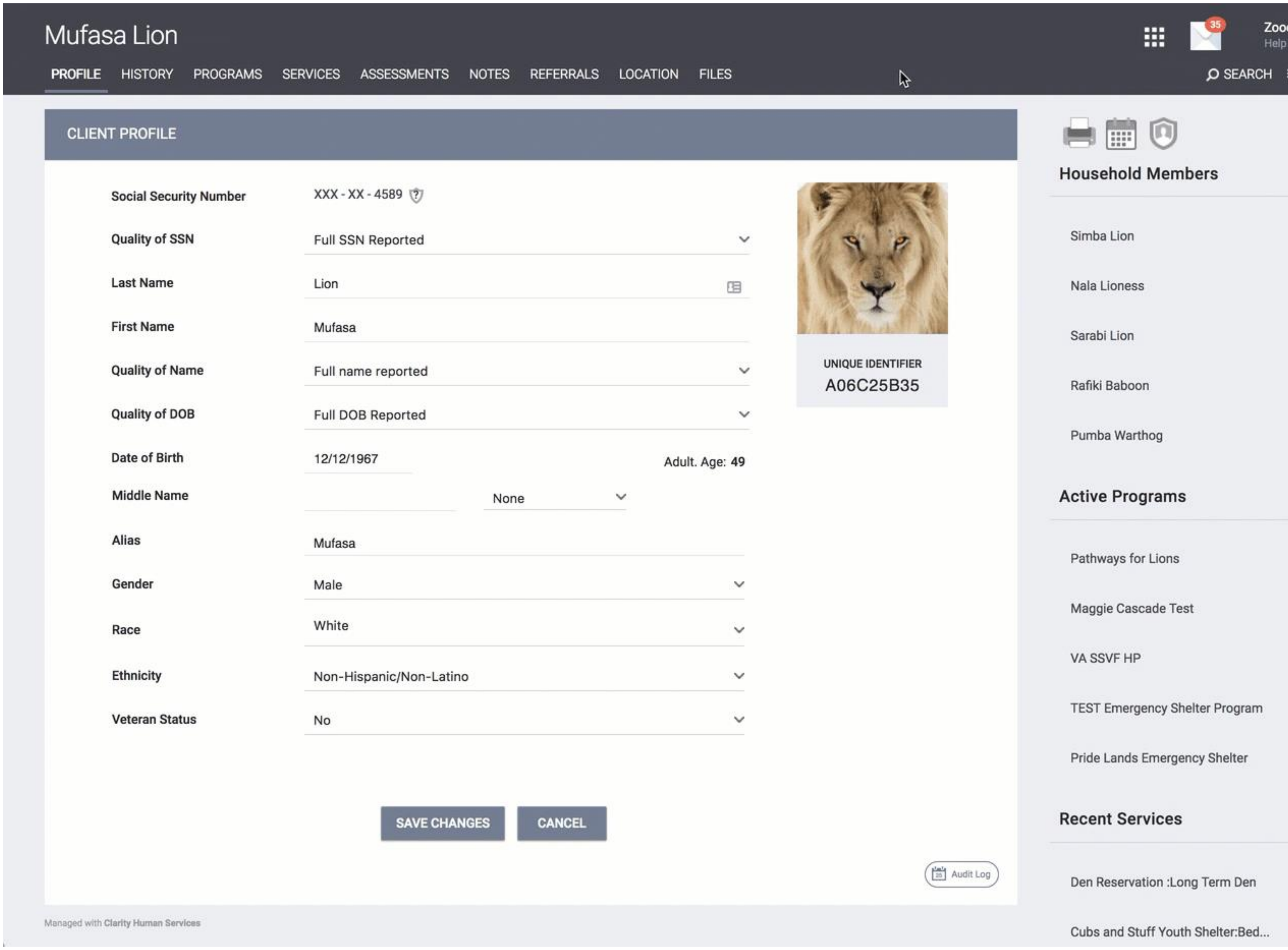
Time Tracking fields are also available allowing the user to track the time spent on creating the client note, or to track time spent working with the client (this is based on agency policy). Utilize the drop-down fields in the *Time Tracking* area to record the number of hours and minutes spent.

Once the Note is completed, click *Add Record* at the bottom of the page.


Mufasa Lion
PROFILE
HISTORY
PROGRAMS
SERVICES
ASSESSMENTS
NOTES
REFERRALS
LOCATION
FILES
31
Zooey Keeper,
Help Center Agency
SEARCH
CASELOAD
CLARITY
HUMAN SERVICES
CLIENT NOTES
Title
Goal Discussion
Agency
Help Center Agency
Date
11/03/2017
Time Tracking:
1 hour
15 min
Note
Bold
Italic
Numbers
Bullets
Had initial discussions today with Mufasa Lion to review his personal goals.
Rule and protect his kingdom
Unite the Pridelanders and Outsiders
Continue providing Kion advice
ADD RECORD
CANCEL
Managed with Clarity Human Services

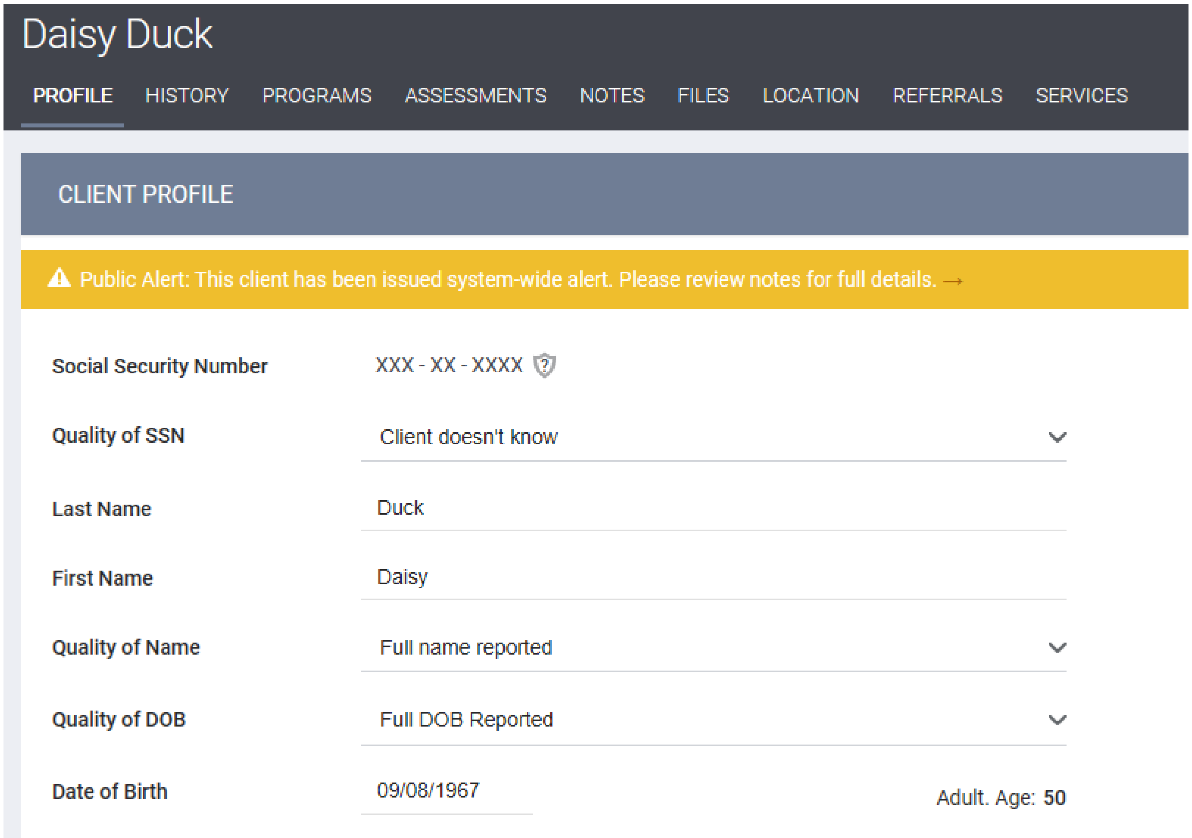
Public Alerts

For situations when it is necessary to notify your agency or several agencies of a client situation/need, a Public Alert can be created to appear on the client profile page. To create a Public Alert, go to the *Notes* tab in the client profile and select *Add Alert*.



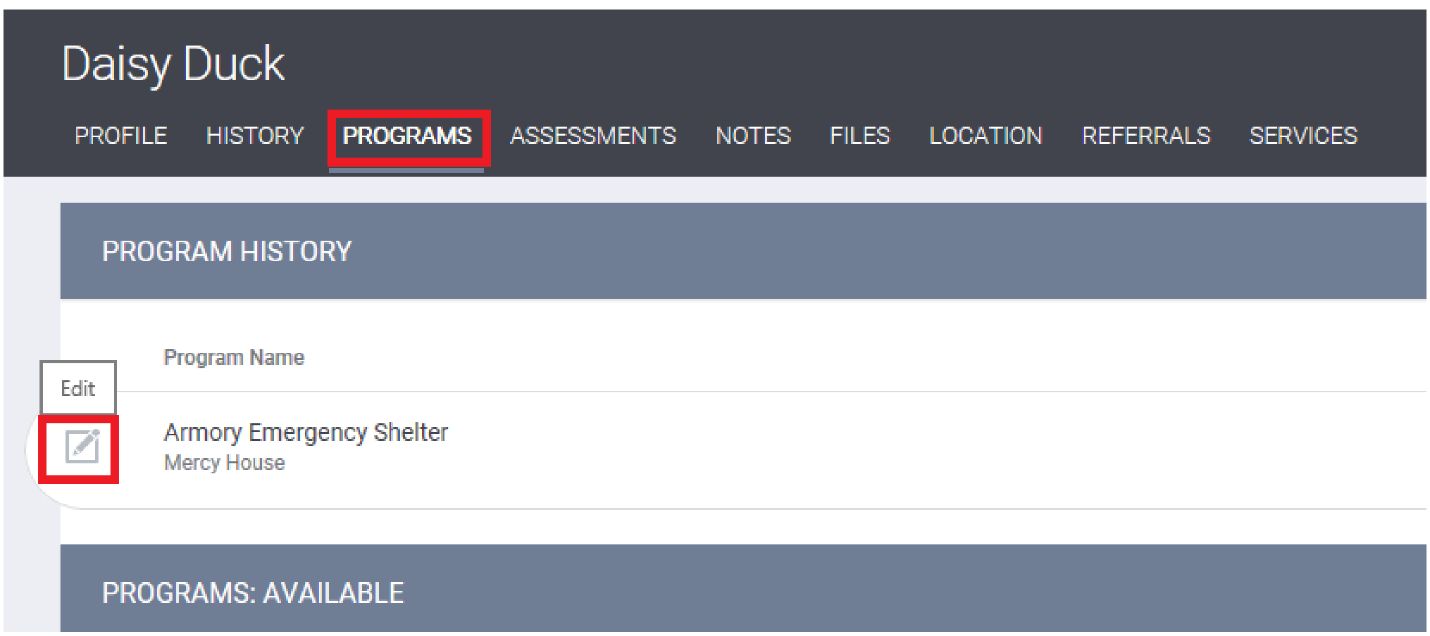
Enter the Public Alert Title, Expiration Date, followed by a Note explaining the nature of the alert. (The *Agency* field will be automatically entered). Selecting the *Private* checkbox will make the Public Alert visible to only staff members in your agency. Not selecting it will make the Public Alert visible to all agencies.

Once the required data is entered, click on Add Record, and the alert will appear on the client's Profile page until the Expiration Date entered.

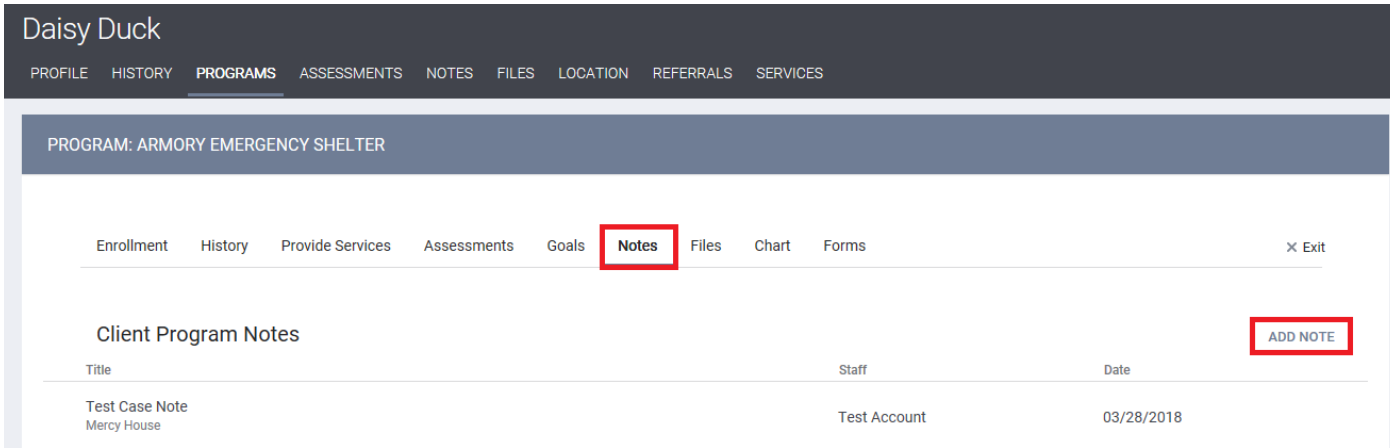


Project Level Client Notes

To add a project level Client Note, search for the client, and go to the Programs page. Then, select your project.



After selecting your project, go to the Notes page, and click on Add Note.



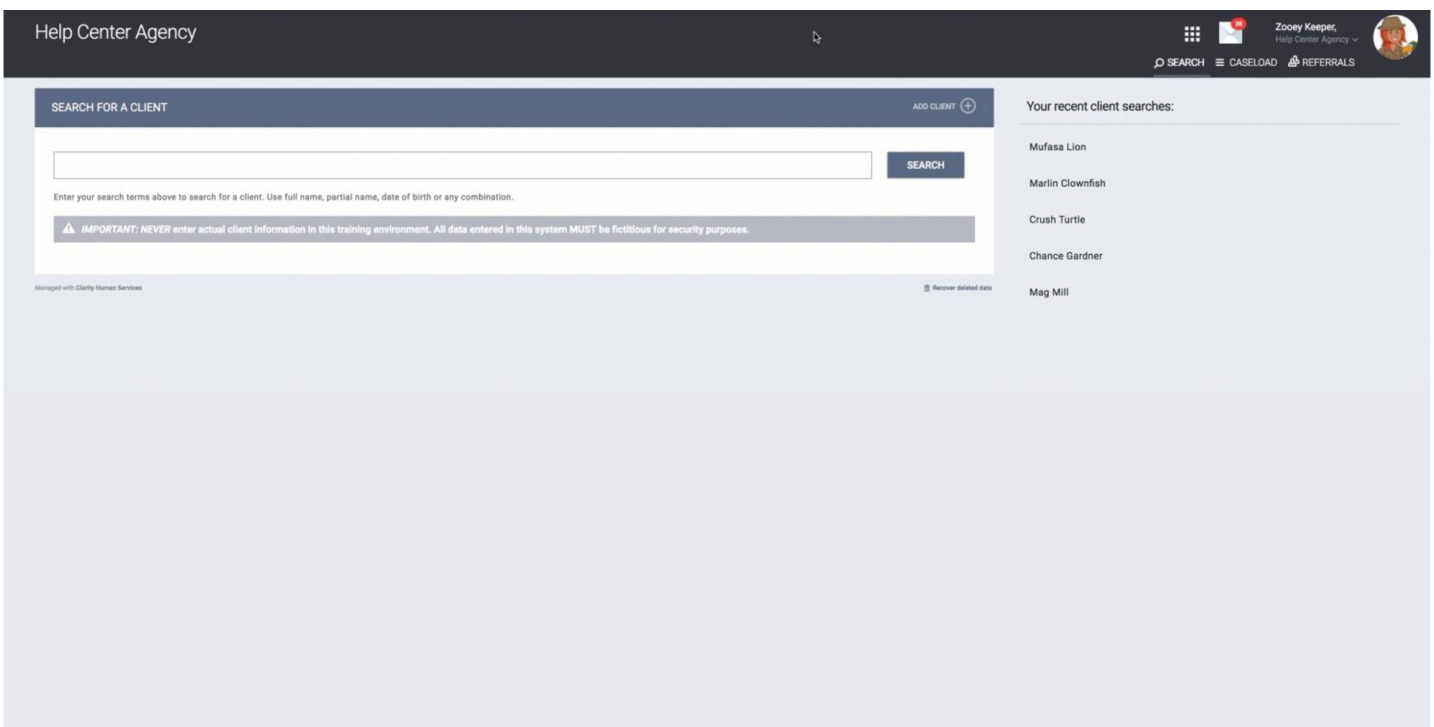
Complete the Client Notes screen as described above. Selecting the *Private* checkbox will make the Client Note visible to only staff members in your agency. Not selecting it will make it visible to all agencies.

Lesson 8 - Client Attendance

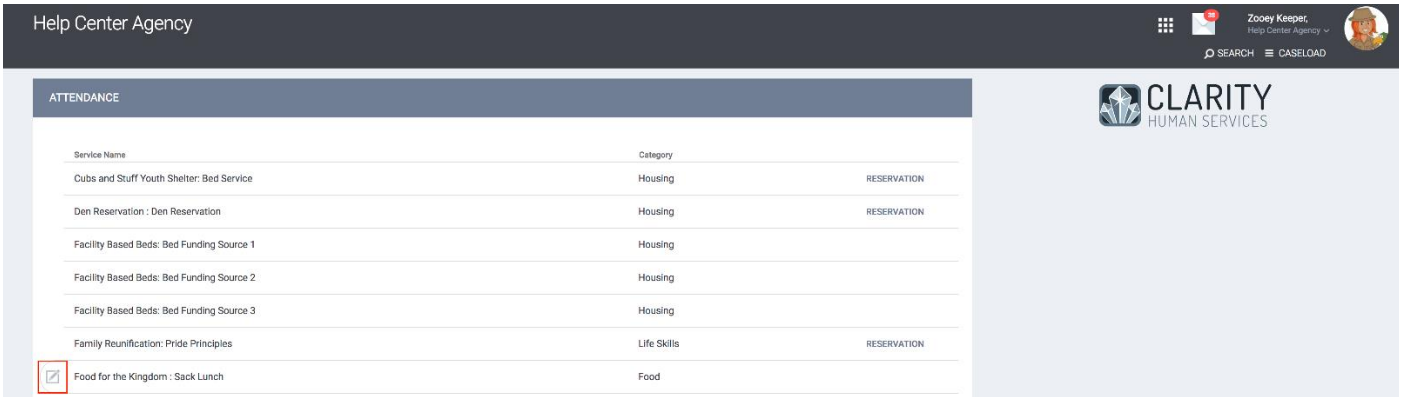
[Click here](#) to check out the Client Attendance knowledge base article!

An attendance-based service is one that is provided on a daily basis, or multiple times per day. Examples of attendance-based services include transportation services and shelter services, like bed nights. The Attendance page is used to add a service to multiple clients at one time. However, services available on the Attendance page are also available on the Provide Services page of a client's enrollment.

To begin working with client attendance, go to the Launcher menu and select the *Attendance* icon.



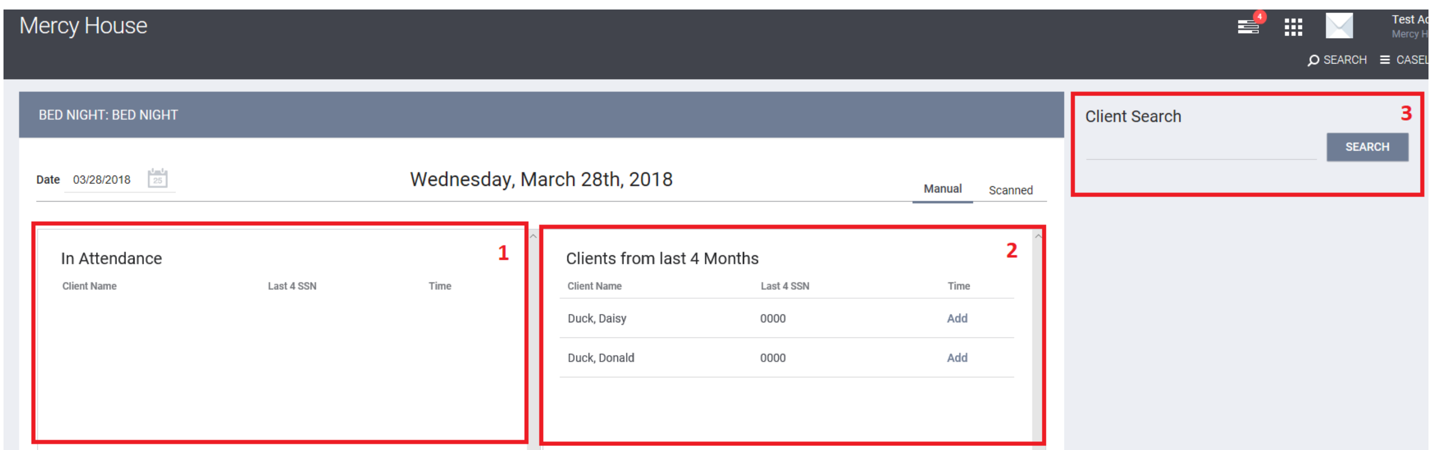
This will take you to the Attendance screen, where you will find a list of the attendance-based services in your agency. Select the Edit link that appears to the left of the service name you wish to modify or view.



The Service Attendance Screen will automatically default to the current date. If needed, you can change the date by selecting the calendar icon.

The Service Attendance screen is divided into 3 sections:

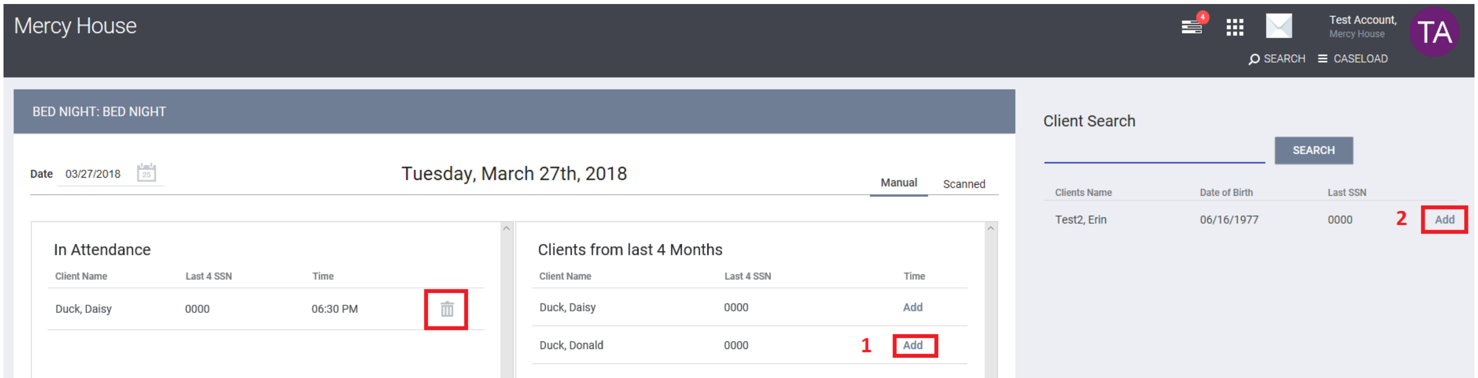
1. The *In Attendance* box is located on the left side of the screen. This is where you will place the clients who received the service on the given date.
2. To the right of this box is the list of clients who have received this service at any point in time during the past 4 months.
3. On the far right side of the screen is the client search box. Here you can enter a client name or part of the name for clients who have not received the service within the past 4 months, and add clients to the In Attendance box.



Attendance can be documented for the data selected by:

1. Adding Names that appear on the list of clients that have received this service in the past 4 months
2. Searching for the client in the search box

A client's attendance can be removed for the selected date by clicking on the Trashcan icon.



Please note that the client must have an enrollment in the project the service is set-up for in order to utilize the Attendance page.

Lesson 9 - Annual and Status Assessments

Click here to read Clarity's Knowledge Base article about Assessments!

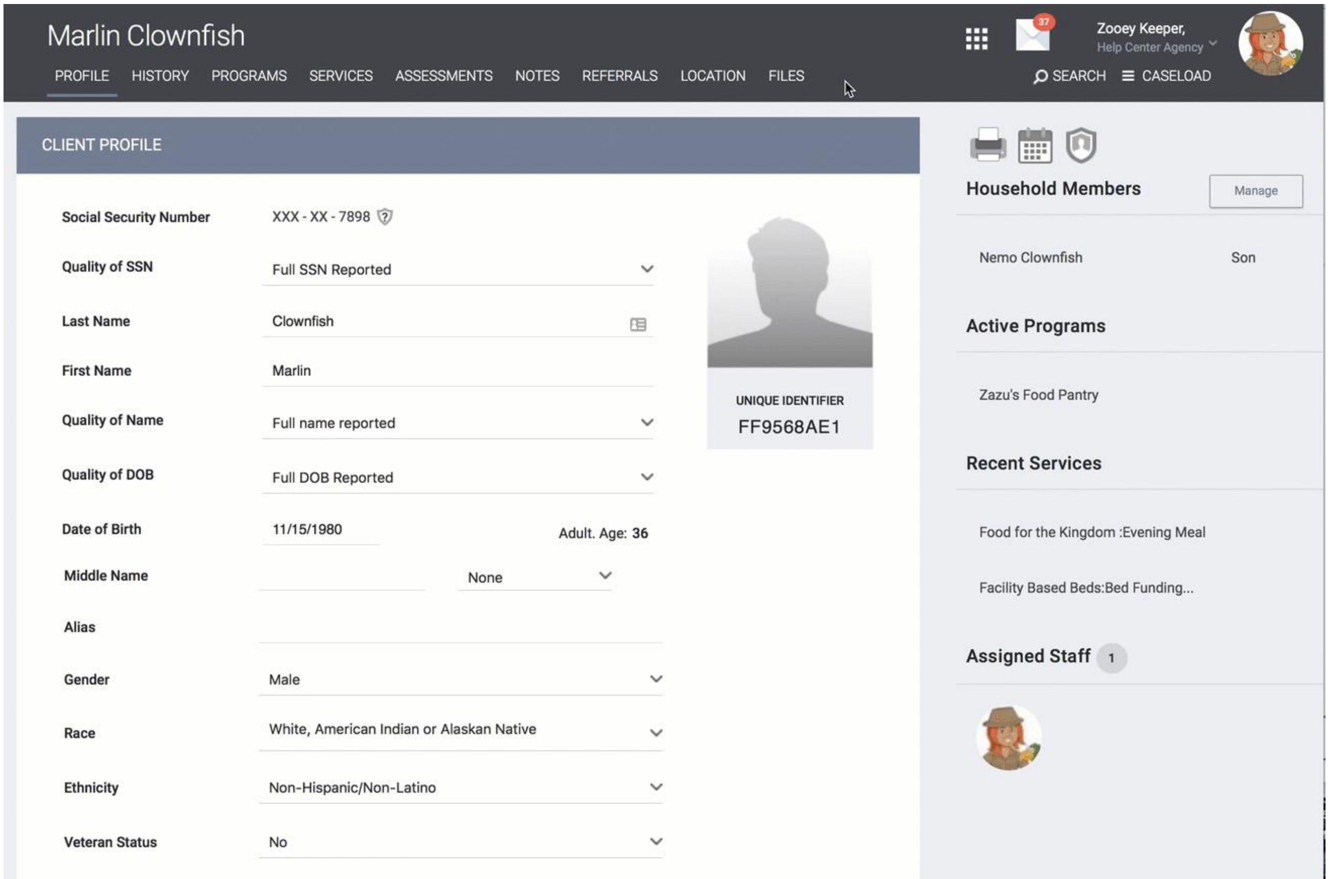
You should conduct Status Assessments any time a client's disability, income, or household composition changes. You can add as many Status Assessments as needed to account for each change in information. Status Assessments should be completed as of the day the client's information changes.

You should conduct an Annual Assessment within the 30 day window before or after the client's one year anniversary of their Program Start Date if they are still active as of one year after their Start Date. In other words, if a client enters your project on 1/1/2018 and they are still active as of 1/1/2019, you should complete an Annual Assessment no earlier than 12/2/2019 and no later than 1/31/2019.

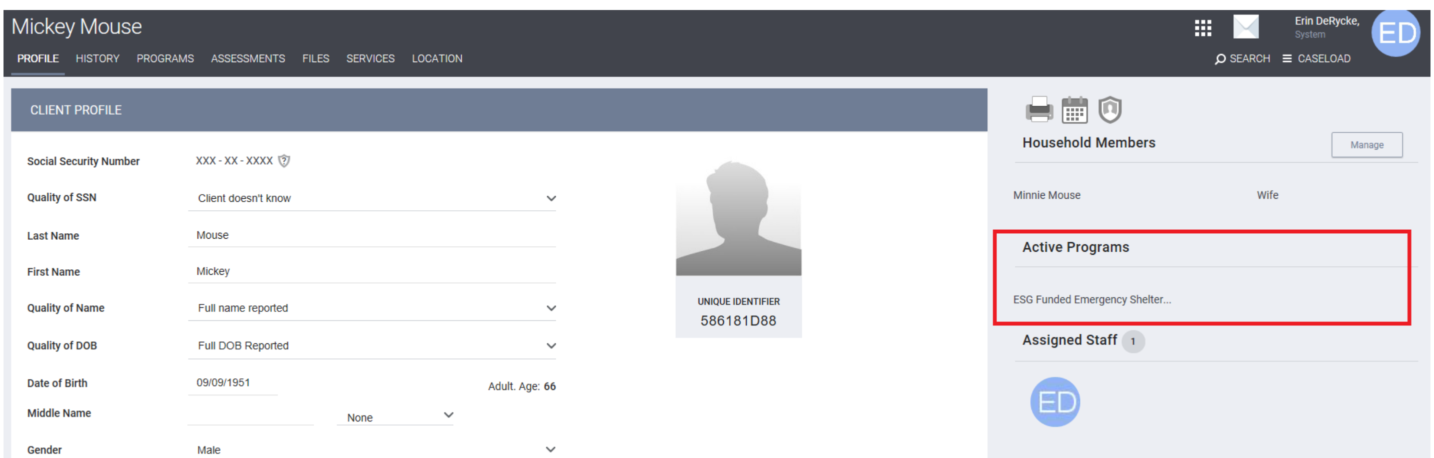
Accessing the Assessment page

The Assessment page can be accessed in two ways:

1. Go to the Programs tab of the client profile. Find the project you wish to add an assessment to and click on the edit icon to the left of that project.



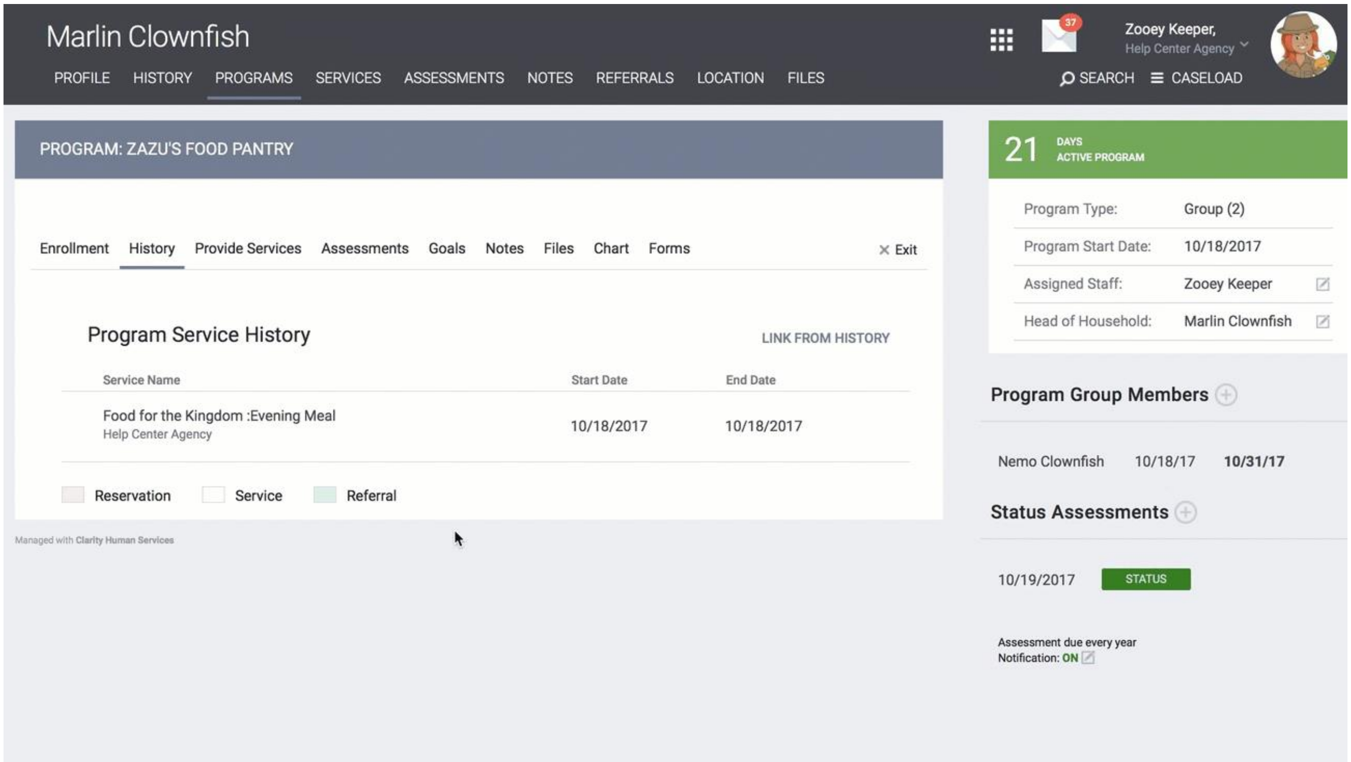
2. Select the Project from the list in the Active Programs section located in the right sidebar of any page in the client profile.



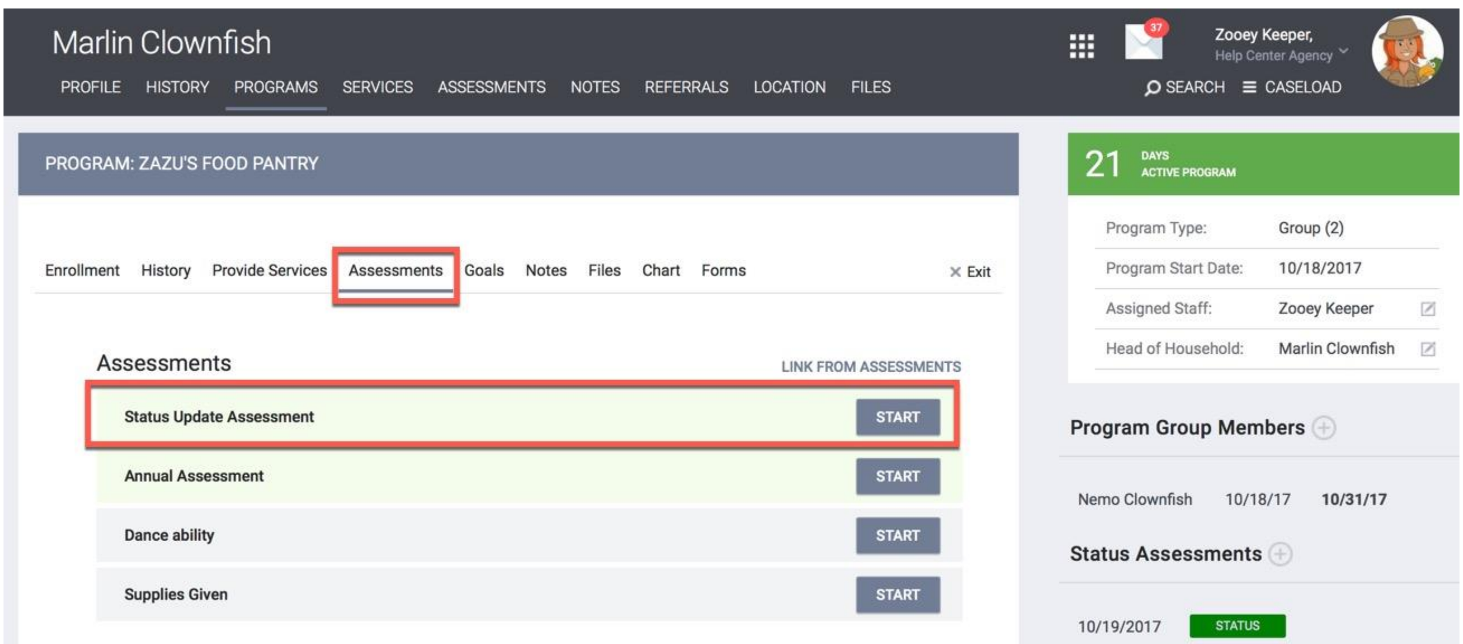
Adding an Assessment

To add an assessment, click on the *Add* link next to Status Assessments and then select the clients for which you want to conduct the status assessment. This will allow you to conduct the status assessment for all selected group members in sequence, without having to go into each client record separately.

Click *Add Status Assessment or Add Annual Assessment* based on the criteria above to access that assessment. Click *Save & Close* (or *Save & Next*, if you are also doing the assessment for other family members) after you have completed the assessment.



You can also add an assessment from the Program Assessment Tab. However, you will have to complete the assessment individually for each client in the household.



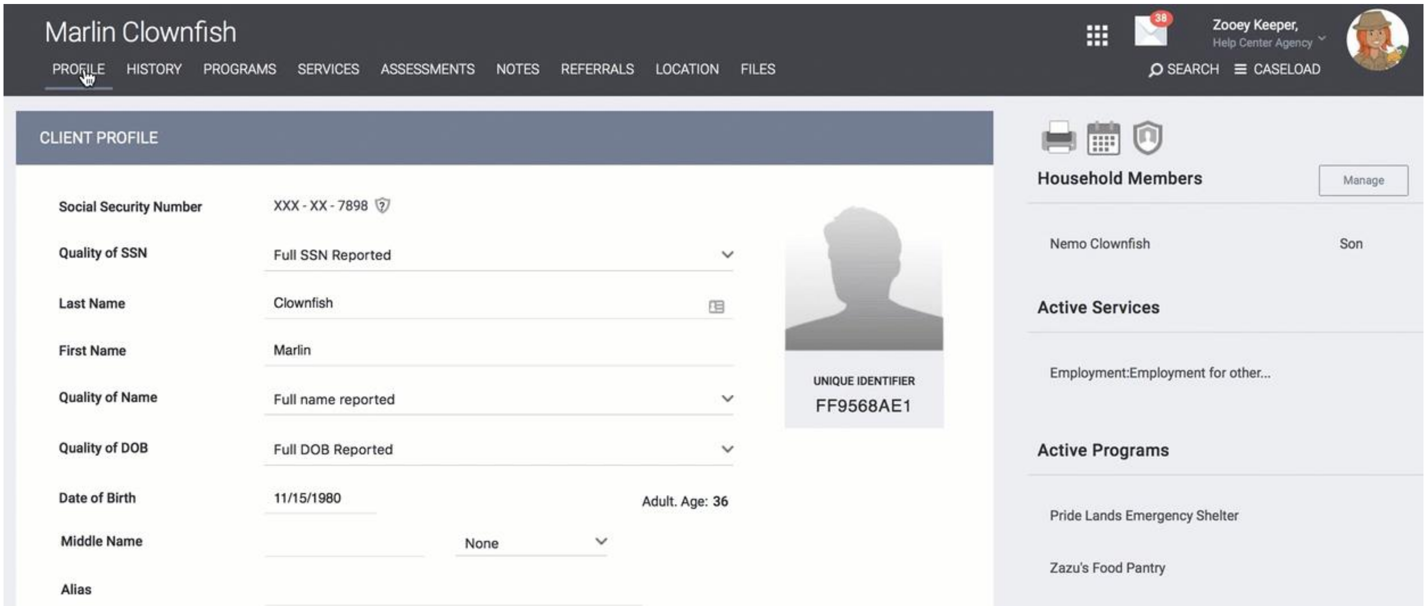
Note: Some of the fields in the assessment may already be completed. Data carries over from either the enrollment screen or the most recent assessment.

Lesson 10 - Exiting Clients From Programs

[Click here](#) to read Clarity's Knowledge Base article on Exiting Clients!

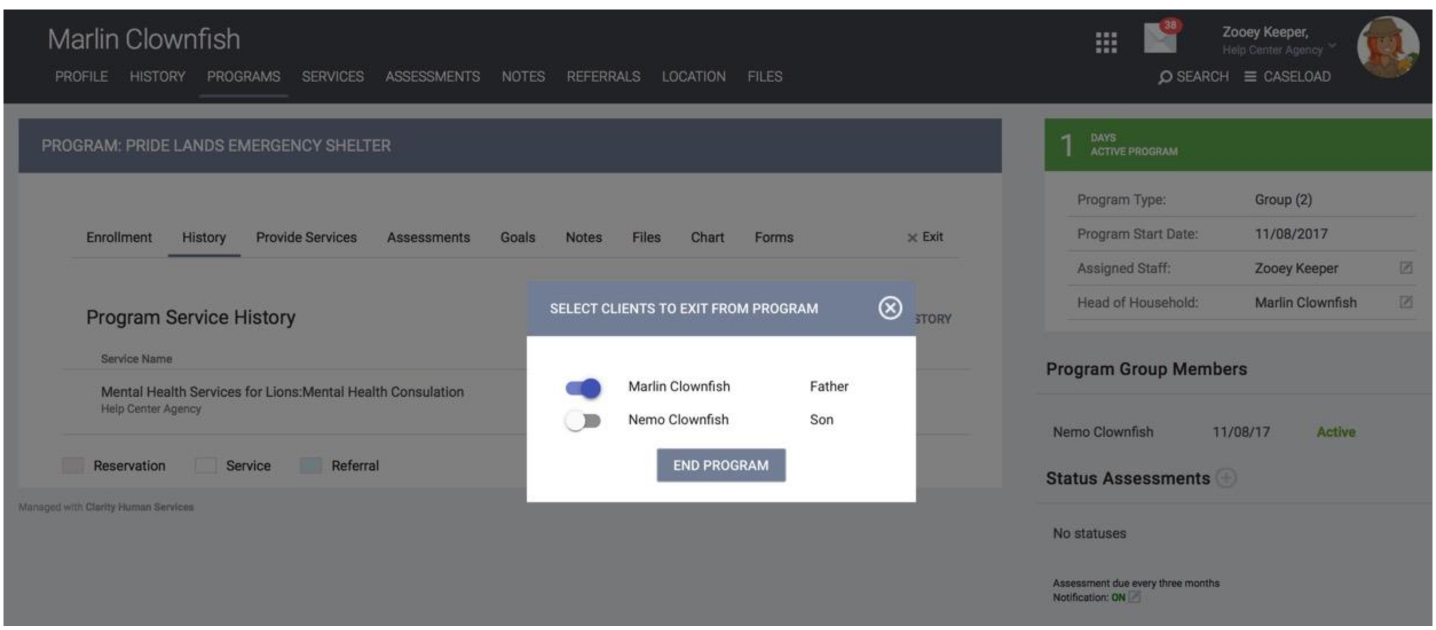
Exiting a Client

To exit a client from a program, go to the *Programs* tab from the client's record, and select the *Edit* icon that appears to the left. Once you are in the program edit screen, click the *Exit* button to the right.



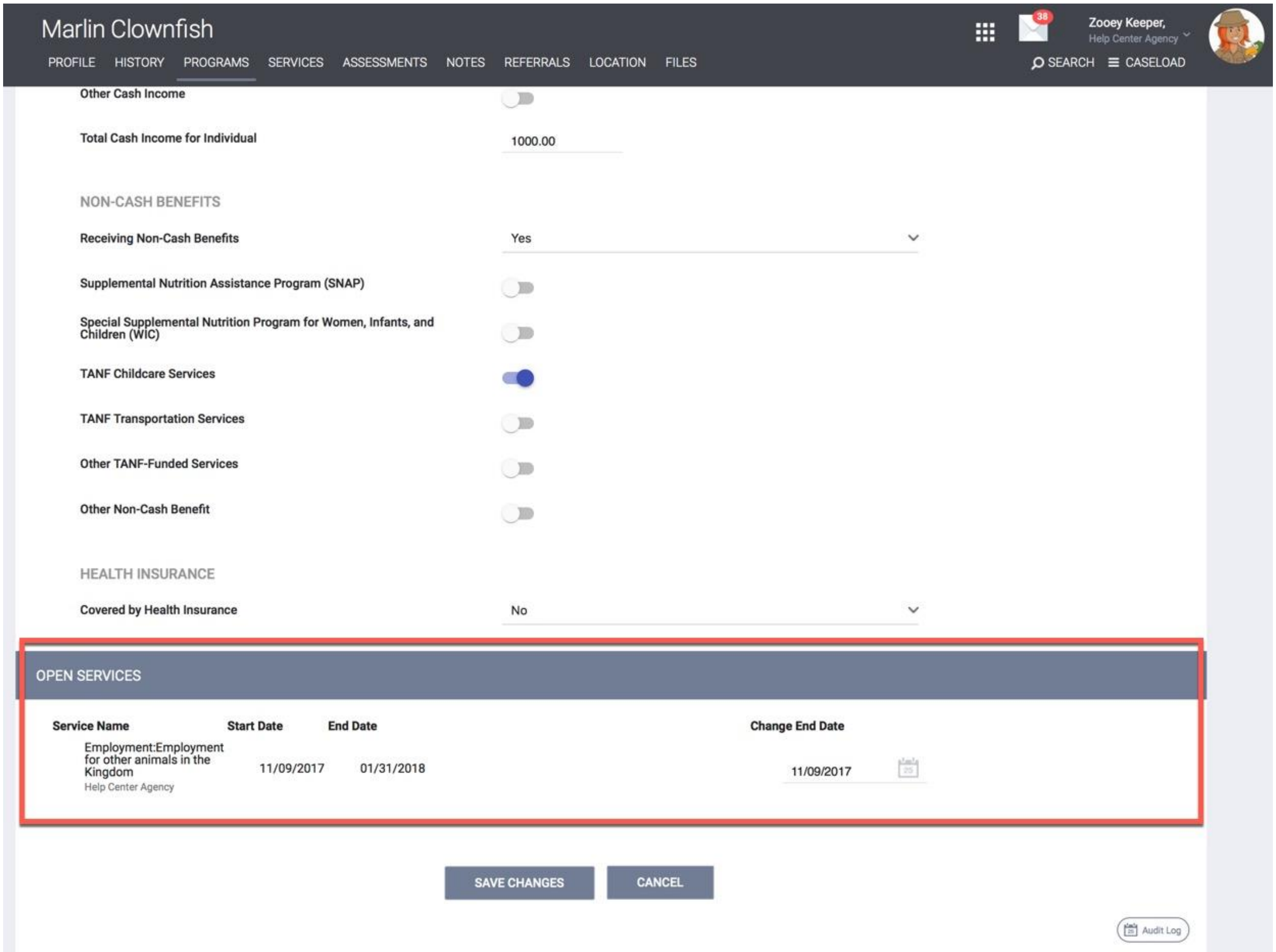
Exiting a Household

When exiting a household, the option to exit several household members will appear. Simply toggle the switch next to the member(s) you wish to exit, and their exit screens will appear in sequential order for each household member. You will need to complete the exit screen for each member of the household.



Open Services

If the client is scheduled for services that will occur after the program exit date, then these services will appear at the bottom of the Exit Program screen where you can conveniently close them by changing the service end date to match the client's Exit date.



Complete the program exit questions and updates on this screen and, if appropriate, close any open services, then select *Save and Close*.

Note: When Ending a program, if a client has any services that are still considered "active" (i.e., their end date goes past the current date), the user has the option to also conveniently adjust those services in batch so they can be addressed all at once when exiting the client from the program.

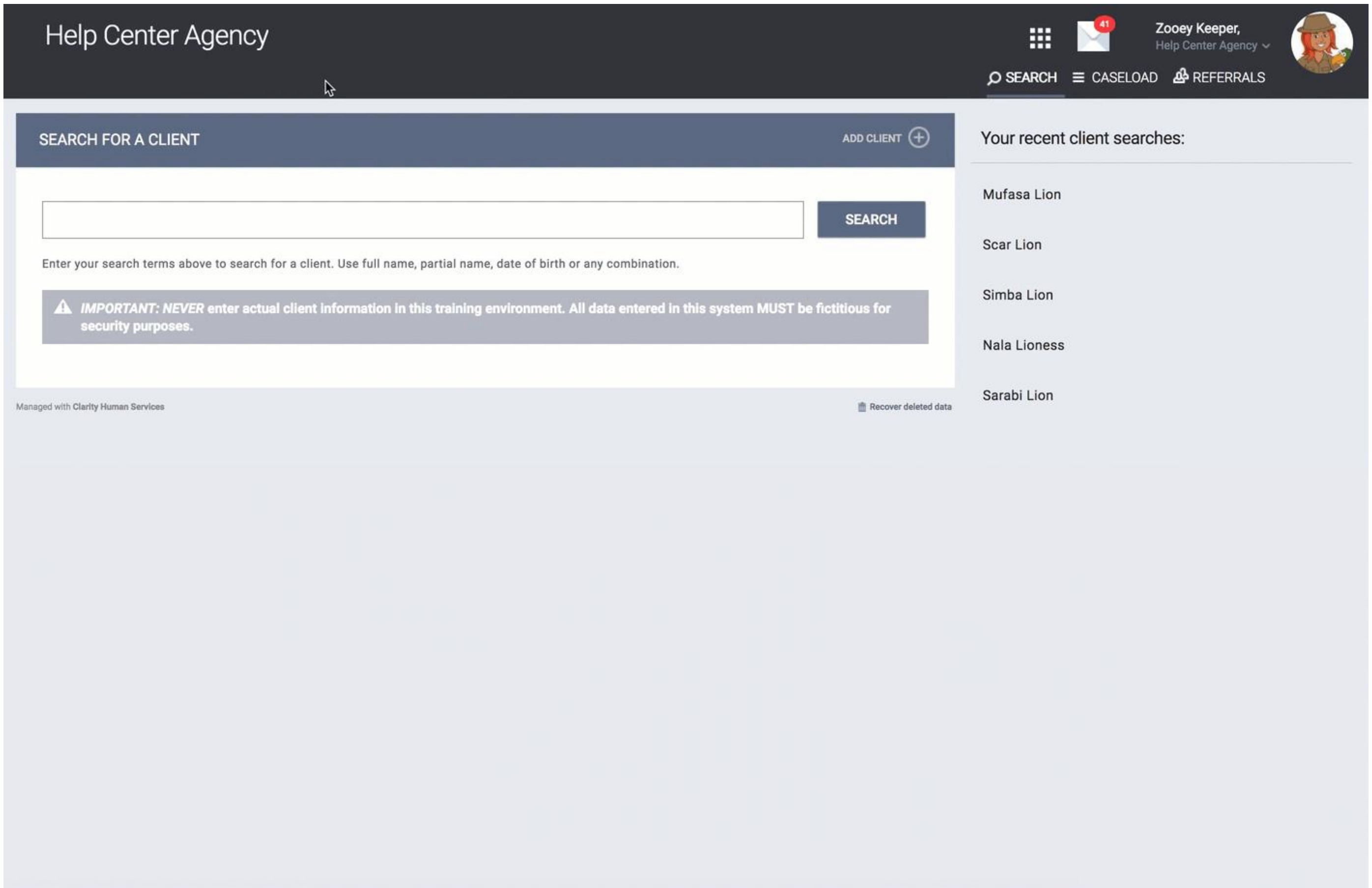
Lesson 11 - HMIS Reports

Click here to read Clarity's Knowledge Base article on running reports!

Accessing the Reports Area

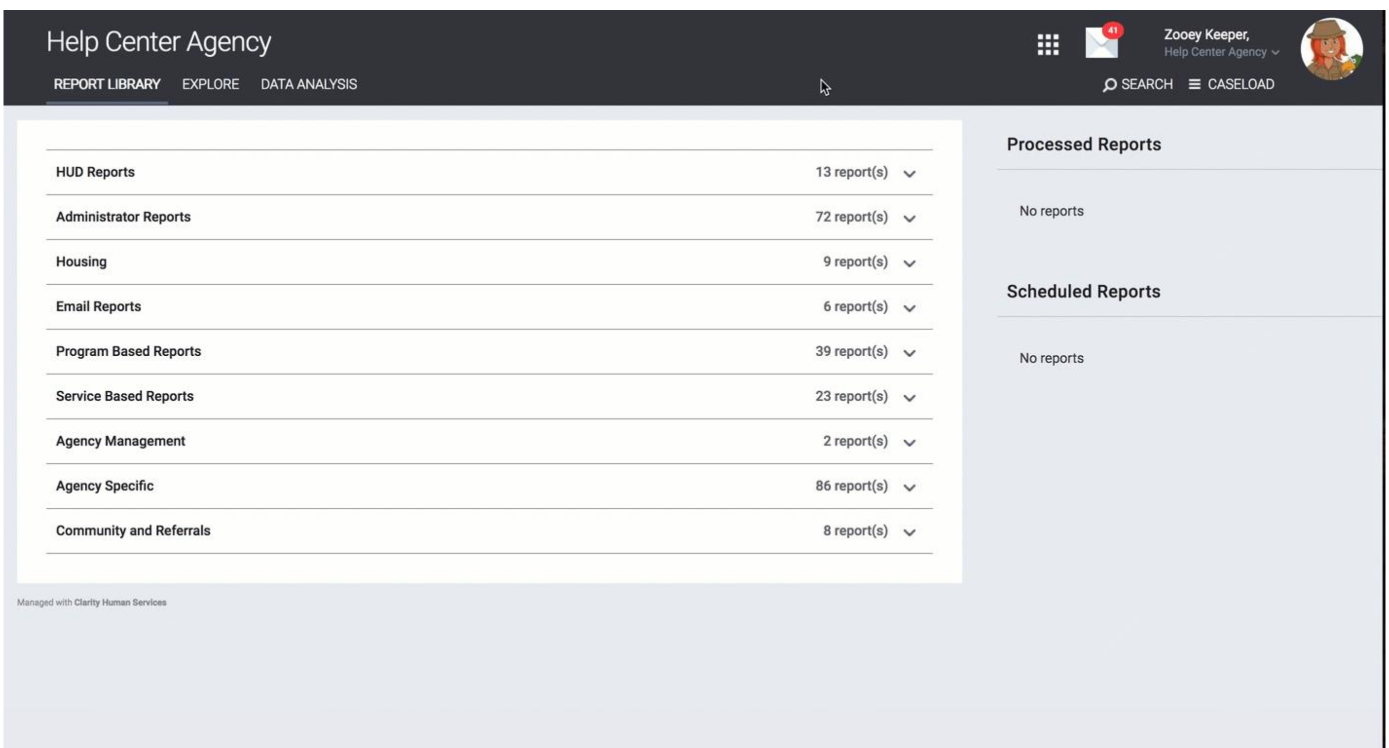
To run or schedule a report, go to the Launcher icon  in the top right of the screen and select the *Reports* icon.

This will bring you to the Report main screen, which is divided into several sections according to report type, with Show/Hide features for easy organization.



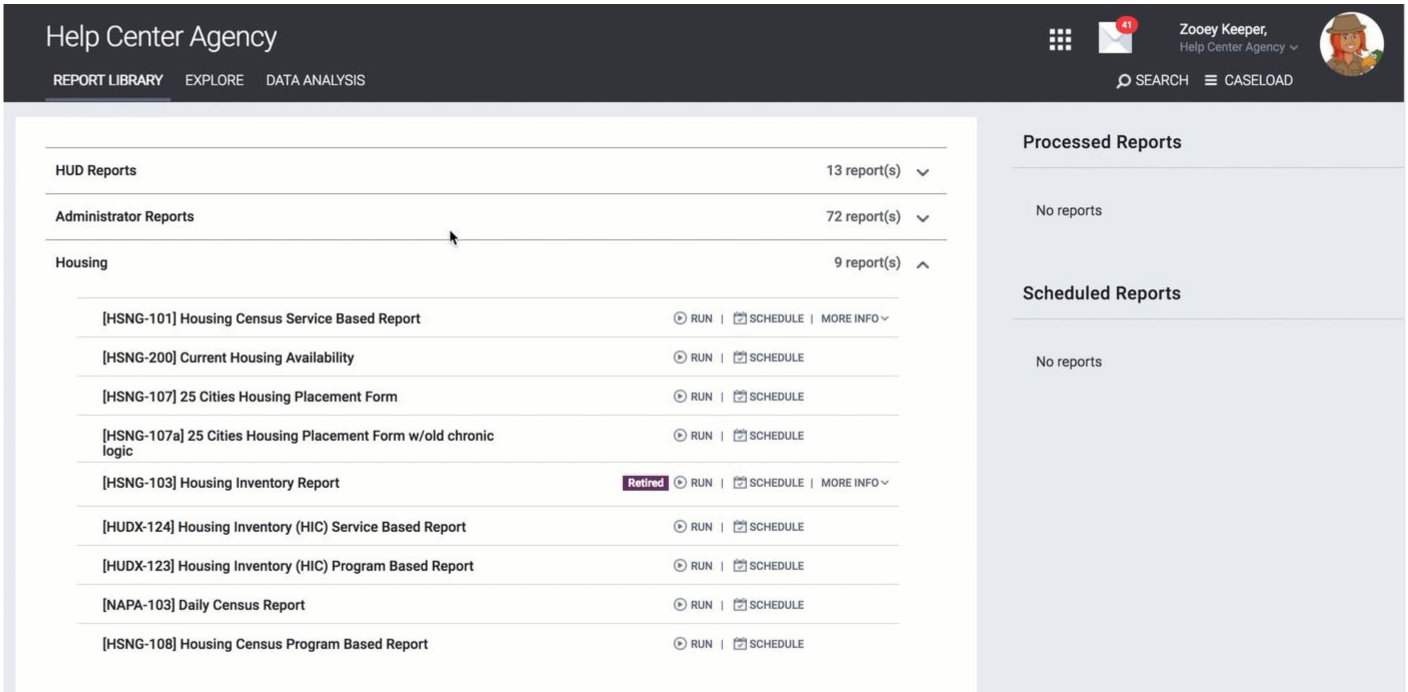
Expanding Report Sections

The report section will expand to make the reports within that section available. Select the up arrow to minimize the screen to its normal size.



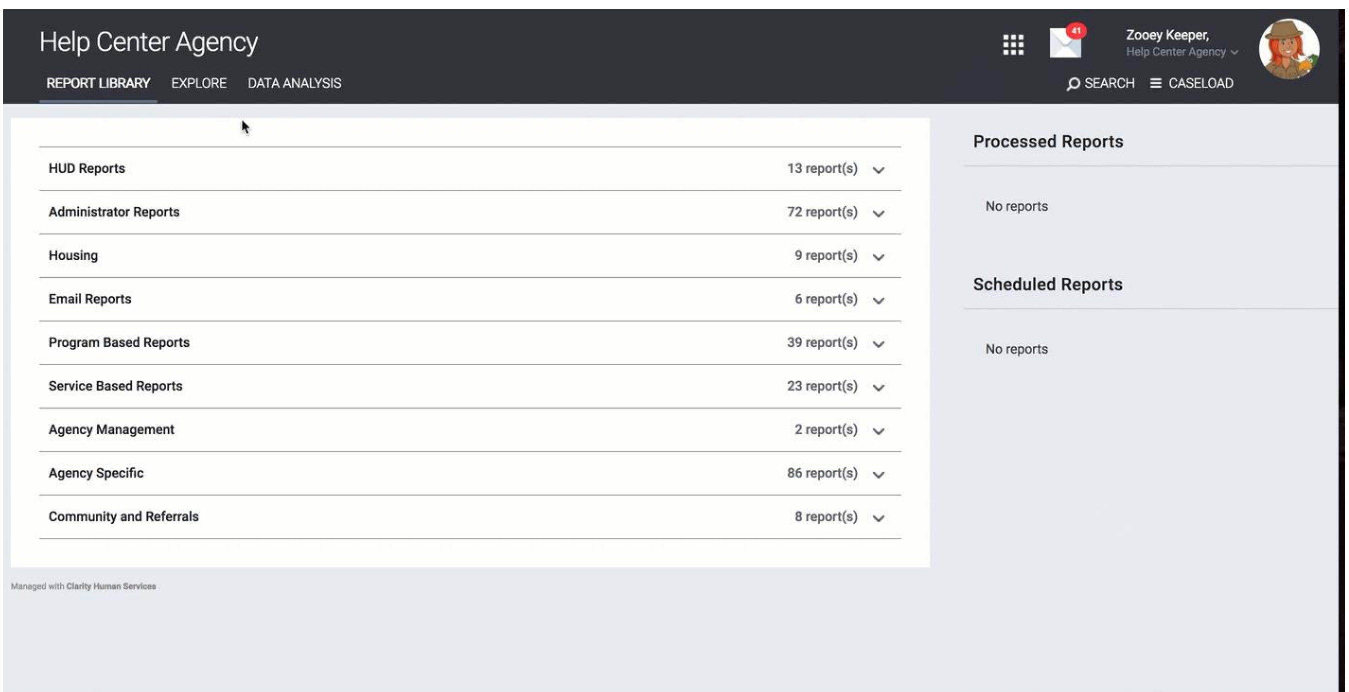
Report - More Info

For more information on a particular report, select the *More Info* link. The screen will expand to include a summary of the purpose of the report.



Running the Report

Clicking the Run link adjacent to the report name will take you to the Preview tab. Here you can select the parameters for each report. Because each report is different, some of the parameter options will vary depending on the report.



Most reports require a starting date and an ending date:

- Starting Date - This date will reflect the date from which you would like to generate data.

- Ending Date - This date will reflect the date you would like to stop generating data.

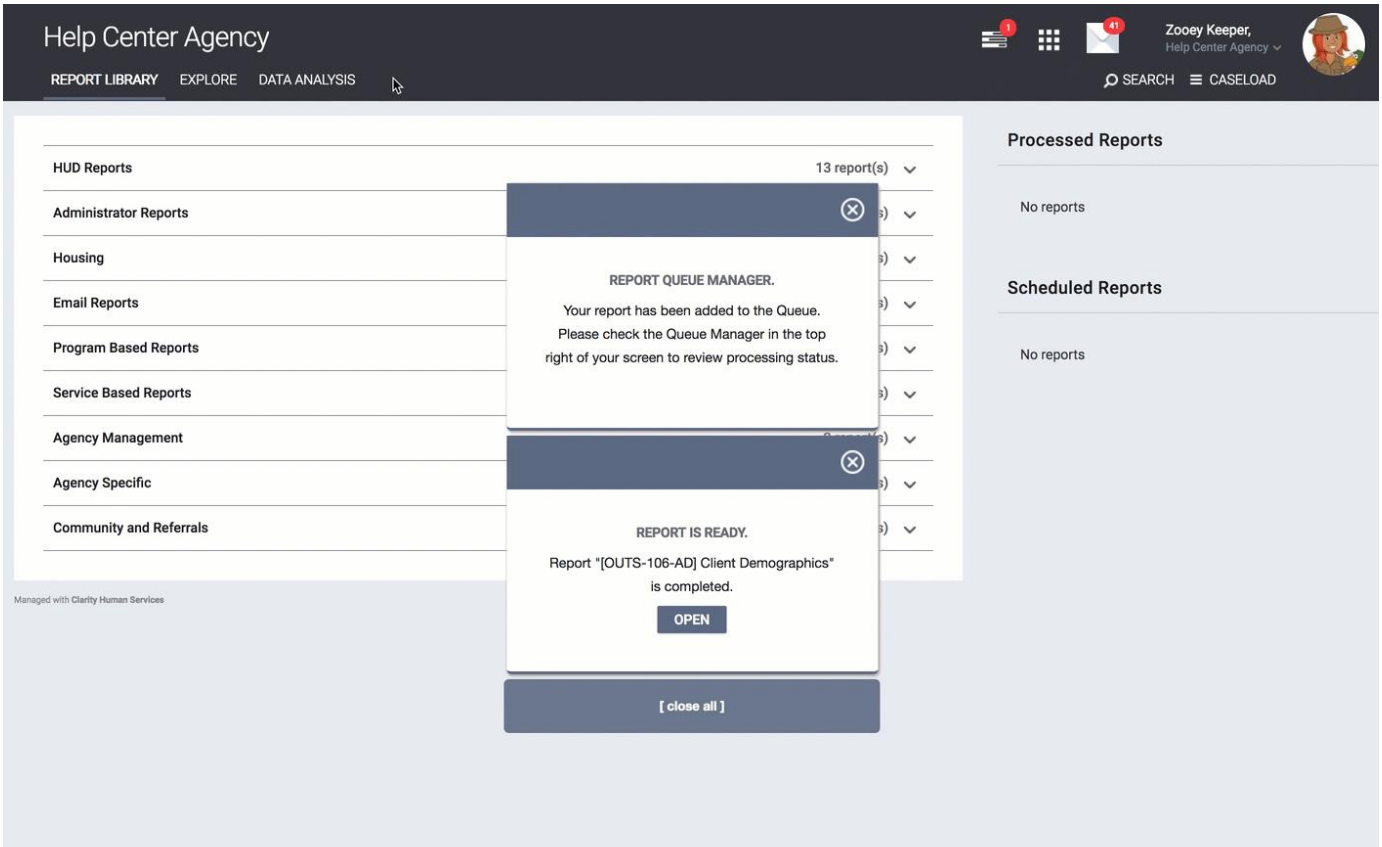
Every report will also ask you to select a report format. You can select Web Page, PDF, or Excel.

- Web Page - A Web Page is a functional format that allows you to click on errors found in the report and be taken to the client record containing the error.
- PDF - The PDF is a good option for official reports, grants, etc.
- Excel file - If you download the excel file you can use excel to manipulate and organize the data (e.g. Sort/Check for duplicates, etc.)

After choosing your parameters, select the *OK* button to run the report.

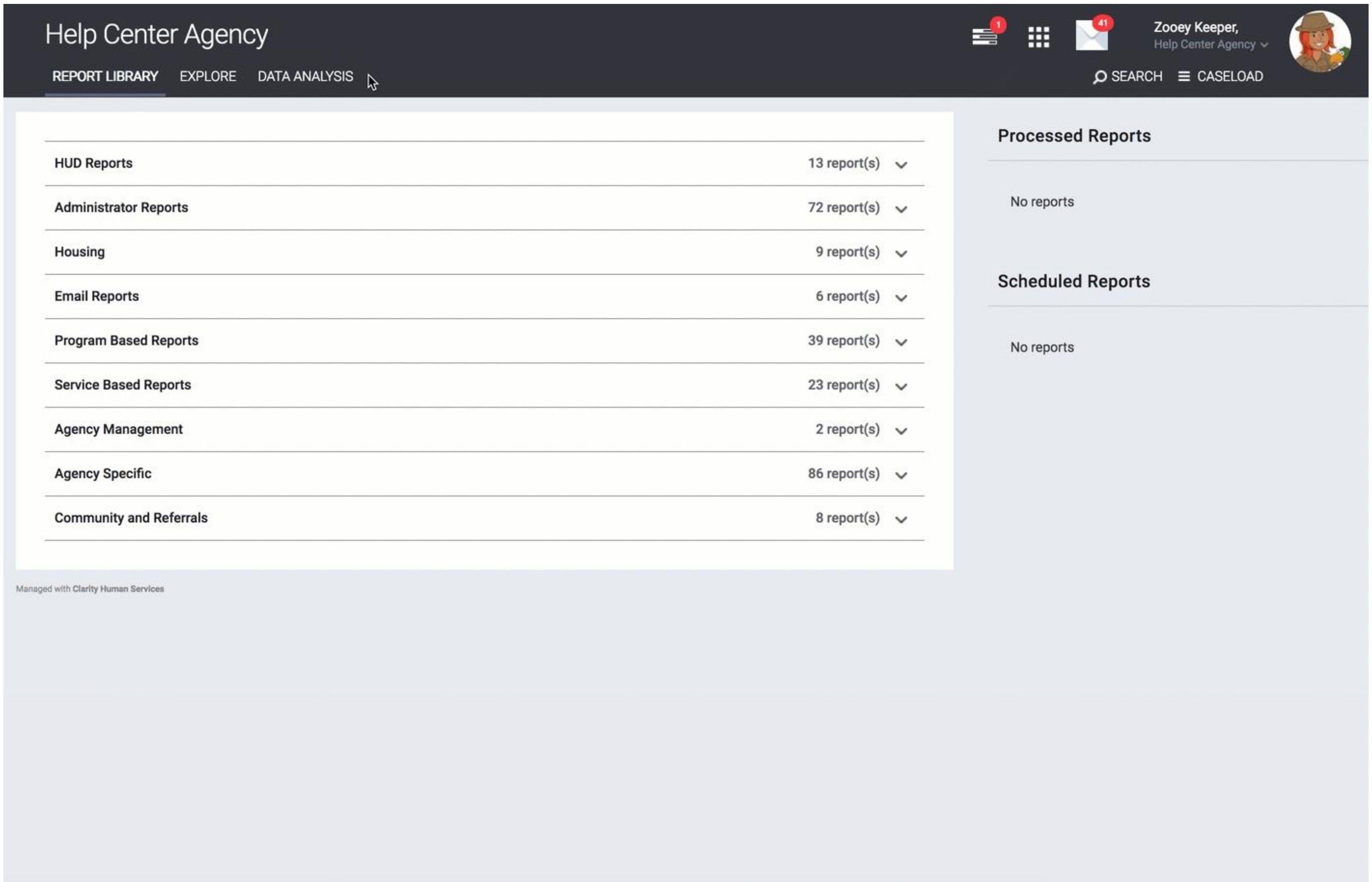
Opening the Report

A popup box will appear indicating that your report is being processed. Once the report is processed, a second popup box will appear below the first indicating the report is ready. Select *Open* to view the report.



Scheduling a Report

Reports can be run immediately, or they can be scheduled to run at specified times. To schedule a report, select the *Schedule* link instead of the *Run* link.



This will take you to the Preview page where you can select the process date for the report. Use the same directions as above for selecting the parameters.

Report Status Badges

You may see colored badges displayed adjacent to report names. These badges are intended to give you a visual indicator of the status of the report. Please consider the report status when reviewing the data populating the report.

- BETA - Indicates the report is in BETA status
- In Development - Indicates that while the report is in production, it is still under development
- In QA - Indicates that the report is currently being tested by the Bitfocus Quality Assurance team
- Retired - Indicates that the report is invalid and no longer intended to be used for official purposes