

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.**

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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.



HOME

SCHEDULED HMIS OUTAGE 2/23 6PM - 10PM

HMIS will be unavailable on Friday, February 23rd, from 6PM to 10PM while a patch is applied to HMIS. We apologize for any inconvenience.

This patch only includes functionality changes for VASH and Street Outreach projects, respectively. Please see these Knowledge Base articles for details of the changes. VASH and Street...[Read More »](#)

HMIS OUTAGE AND NEW STREET OUTREACH DATA ENTRY PROCESS CANCELLED

Search ... C

HMIS Clarity Login

HMIS Documents

HMIS Help Desk

HMIS Training Site

HMIS Calendar

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

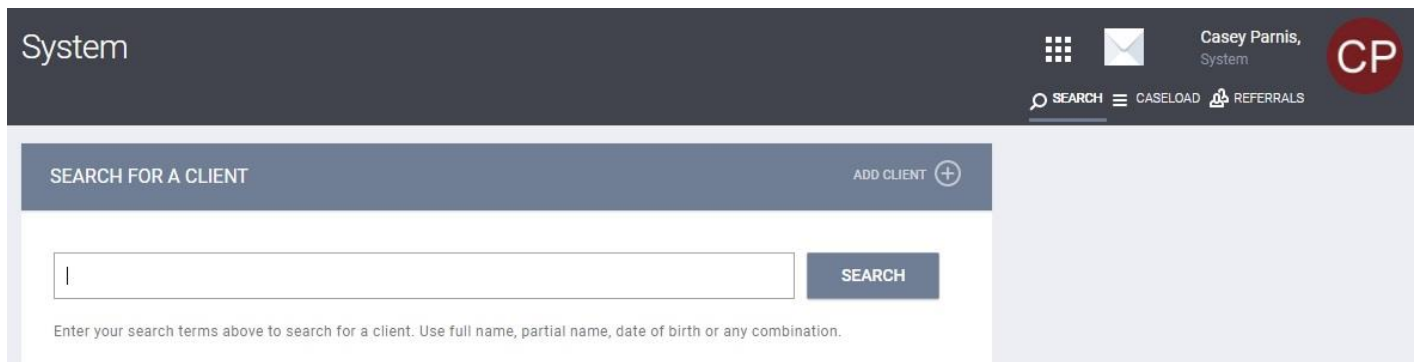
Lesson 2 - Adding a New Client

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.



The screenshot shows a dark grey header with the word "System" on the left. On the right, there are icons for a grid, an envelope, and a red circle with "CP". Below these are the names "Casey Parnis, System" and navigation links for "SEARCH", "CASELOAD", and "REFERRALS". Below the header is a light blue search bar with the text "SEARCH FOR A CLIENT" and an "ADD CLIENT (+)" link. A search input field is present with a "SEARCH" button. Below the input field is a small text instruction: "Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination."

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.***

CREATE A NEW CLIENT

Social Security Number	000 - 00 - 0000
Quality of SSN	Client refused ▼
Last Name	Parnis
First Name	Casey
Quality of Name	Full name reported ▼
Quality of DOB	Full DOB Reported ▼
Date of Birth	01/01/1989 Adult. Age: 29
Middle Name	None ▼
Gender	Female ▼
Race	White ▼
Ethnicity	Non-Hispanic/Non-Latino ▼
Veteran Status	No ▼

ADD RECORD

CANCEL

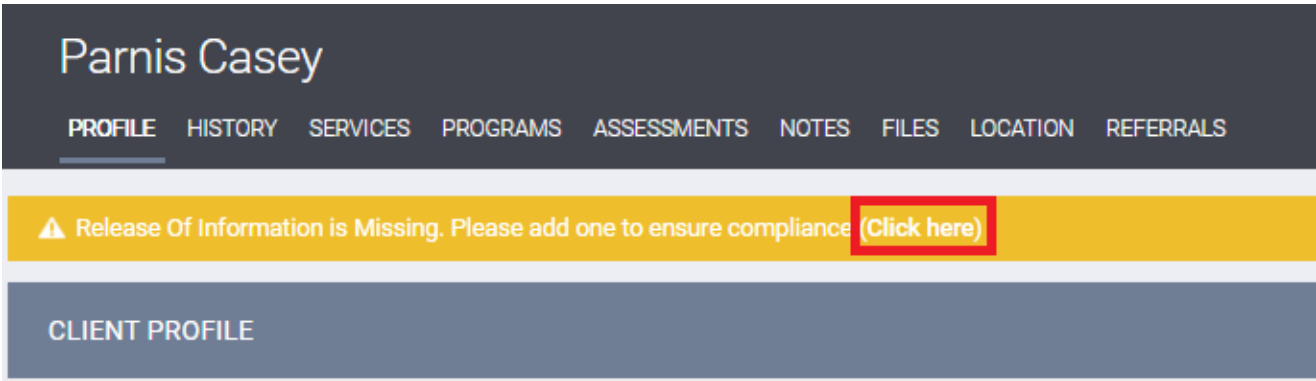
Once you have saved your client's record, a yellow ribbon will appear at the top of the screen that takes you to the Release of Information section. Continue on to the next lesson to learn how to complete a Release of Information!

Lesson 3 - Release of Information

[Click here](#) to read Clarity's Knowledge Base article on Releases of Information!

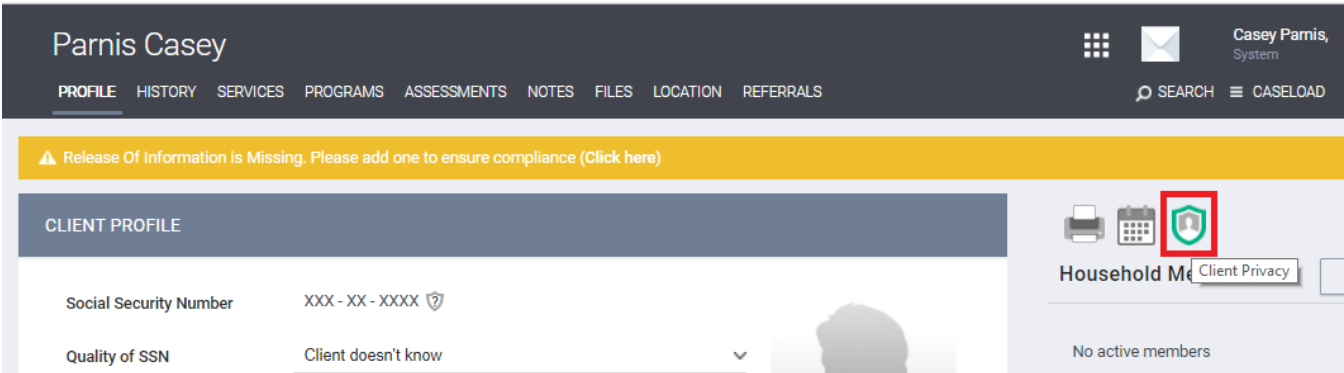
There are two ways to access the Release of Information page:

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 is Missing. Please add one to ensure compliance (Click here)

PRIVACY

Client Privacy

Public

Private

SAVE CHANGES

CANCEL

RELEASE OF INFORMATION

ADD RELEASE OF INFORMATION +

There are no results to display

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.

RELEASE OF INFORMATION

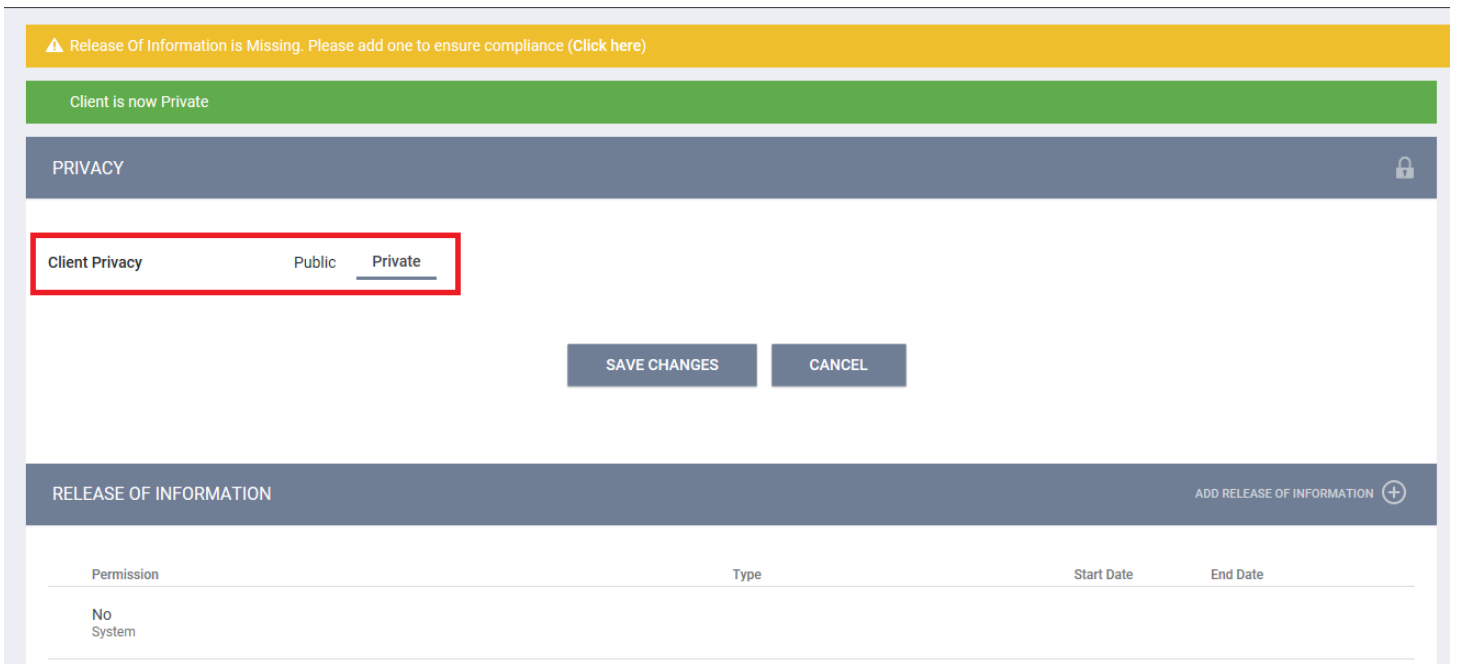
Permission	Yes	▼
Start Date	03/12/2018	25
End Date	03/12/2019	25
Documentation	Select	▼

ADD RECORD

CANCEL

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

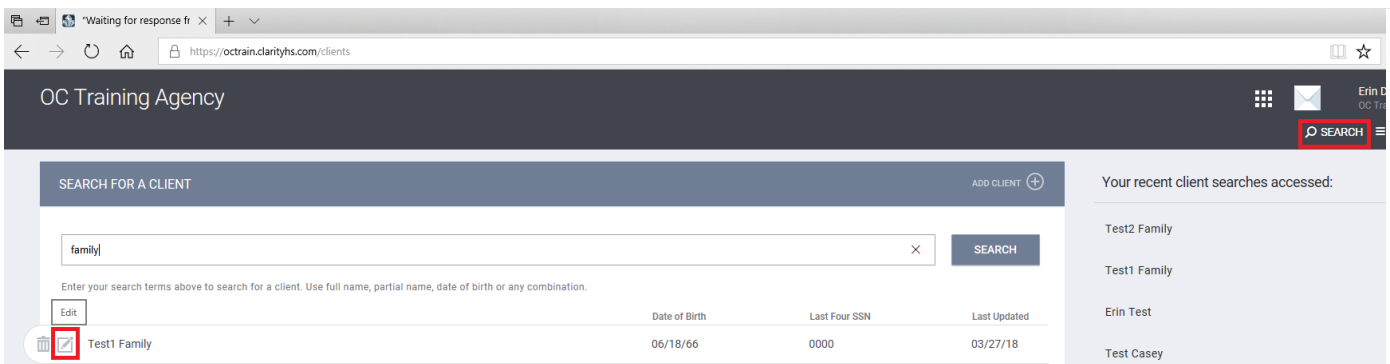
[Click here](#) to read Clarity's Knowledge Base article on creating and managing household members.

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.

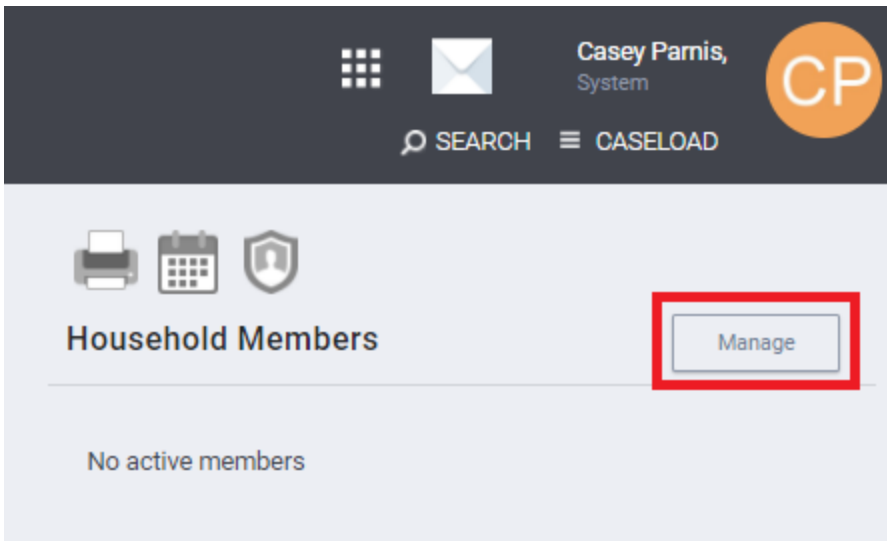
Adding a Client to a Household

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.

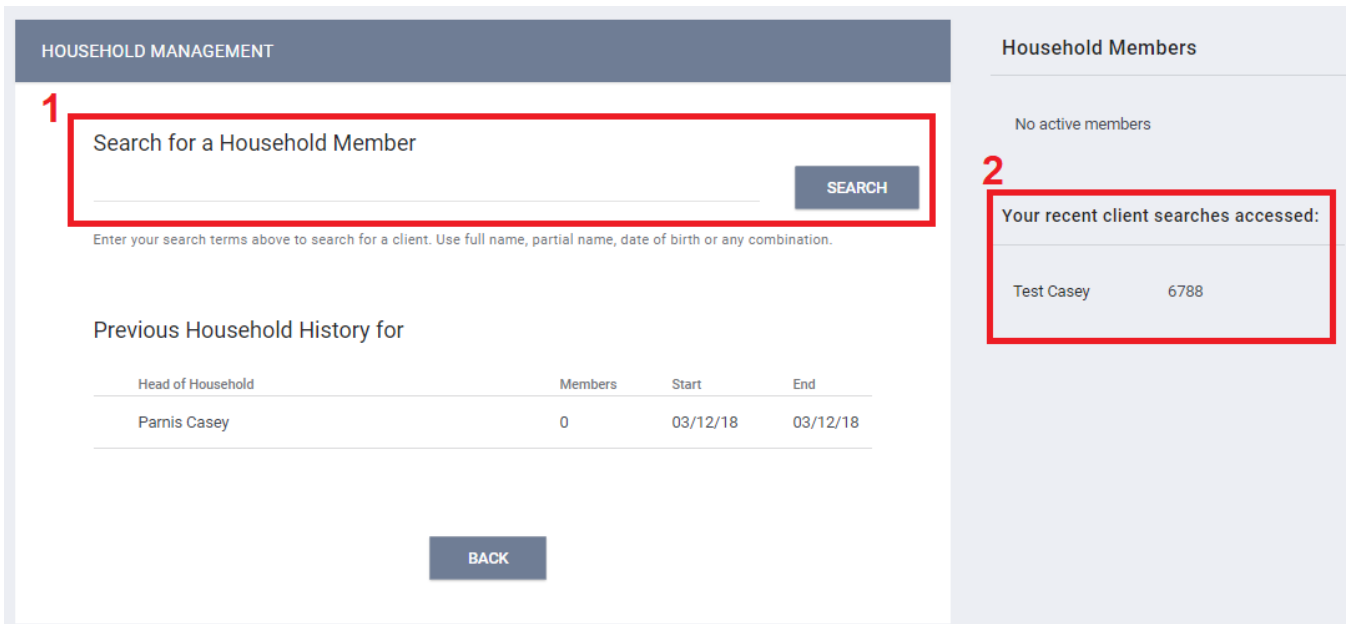


Then, click on the "Manage" button.



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.

HOUSEHOLD MANAGEMENT

Search for a Household Member

casey SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Client	Date of Birth	Last Four SSN	Last Updated
Parnis Casey	01/10/89	6788	03/12/18
+ Add Test Casey	12/22/89	6788	03/12/18

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.

ADD TO HOUSEHOLD ✕

Member Type Not Set ▾

Start Date 03/12/2018

SAVE

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)
 - o 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
 - o If using this option, enter the Member Type and the Start Date for the client being added to the household

JOIN HOUSEHOLD ✕


 Active client is already in a Household. This action will end involvement in the current group and add as a member of the selected group.


Leave existing Household to join Test Client's Household
Transfer Test Client from their existing Household to this Household

EXISTING HOUSEHOLD

Existing End Date  **1**

NEW HOUSEHOLD

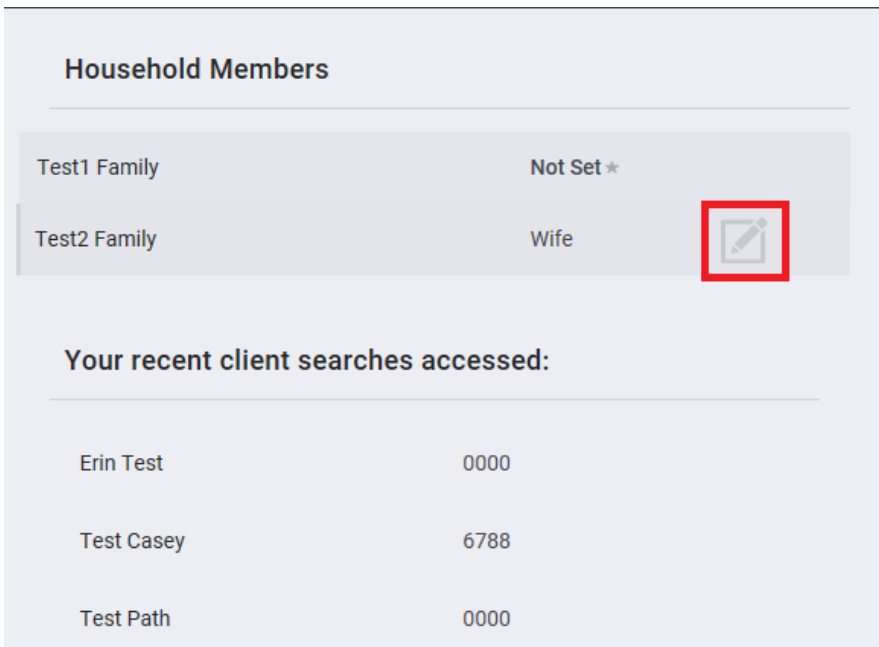
Member Type 

Start Date  **2**

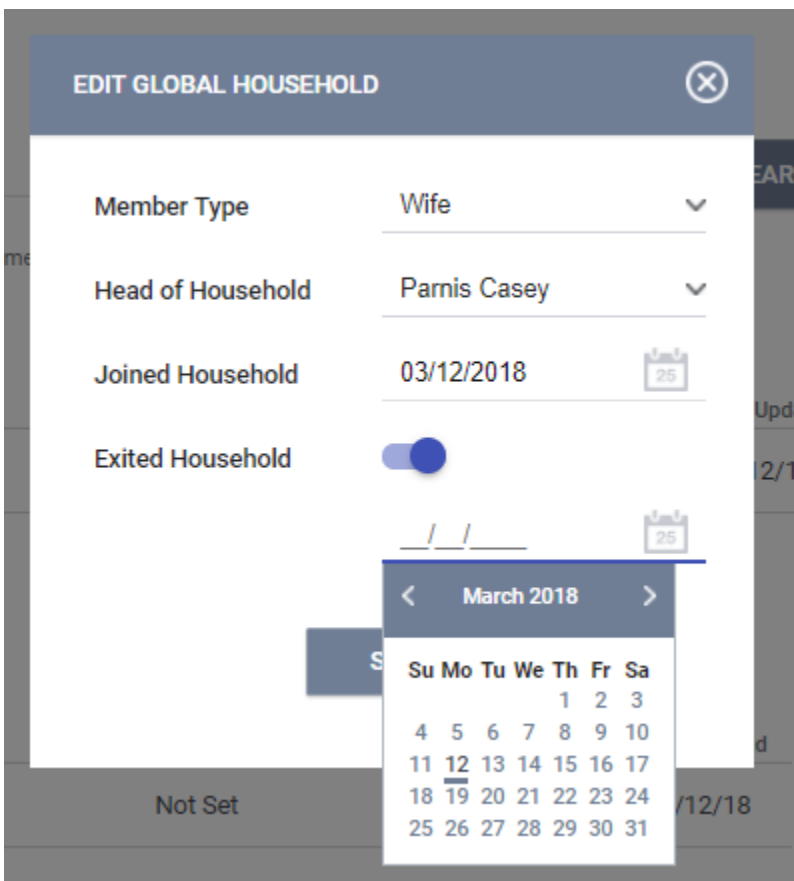
SAVE

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.



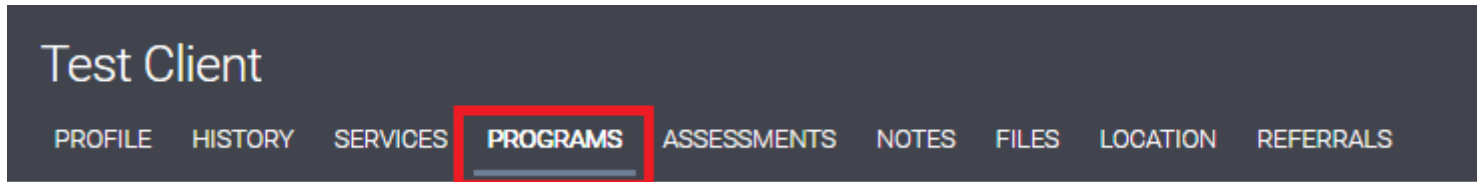
A popup box will appear. Click the *Exited Household* switch and, in the *End Date* field, enter the date you wish to stop the client's participation in the household. The client will be considered a member until that date. After the date has passed, the client will automatically be removed from the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



Lesson 5 - Enrolling Clients in a Project

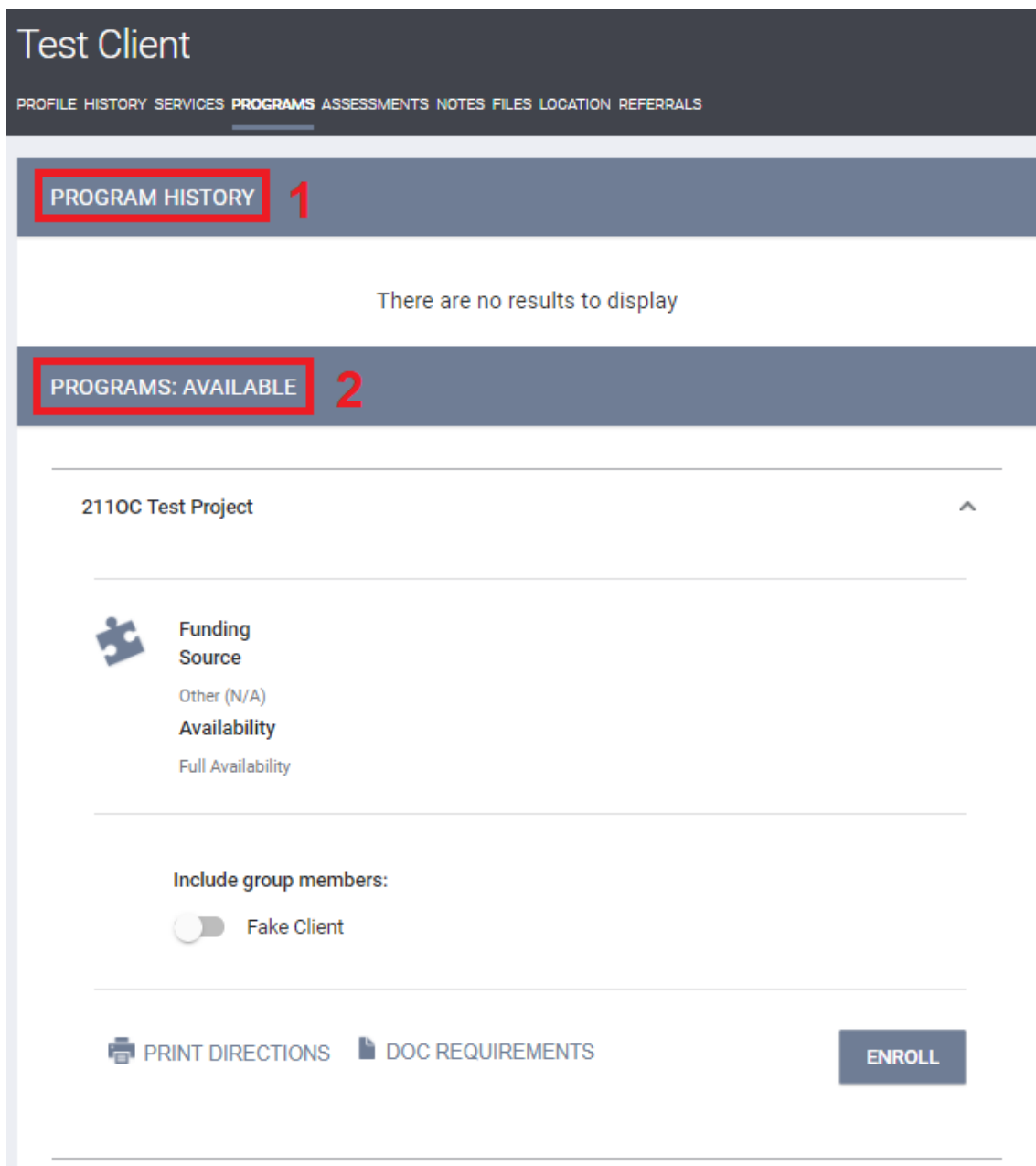
[Click here](#) to read Clarity's in depth Knowledge Base article on enrolling clients in project!

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

2110C Test Project

1

PROGRAM DESCRIPTION:

This is a test program for training purposes.

2

Occupancy (Today)



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](#))

Enroll Program for client Test Client

Project Start Date	03/13/2018 
Relationship to Head of Household	Self (head of household) 
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response) 
Is the Program Type Either Emergency Shelter, Safe Haven, or Street Outreach?	Yes (Automatically Generated Response) 
LIVING SITUATION	
Type of Residence	Place not meant for habitation 
Length of Stay in Prior Living Situation	One year or longer 
Approximate Date Homelessness Started	10/01/2016 
Number of times on the streets, in ES, or Safe Haven in the past three years	One Time 
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	More than 12 Months 

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	<hr/>	
Earned Income	<input type="checkbox"/>		
Unemployment Insurance	<input type="checkbox"/>		
Worker's Compensation	<input type="checkbox"/>		
Private Disability Insurance	<input type="checkbox"/>		
VA Service-Connected Disability Compensation	<input type="checkbox"/>		
Social Security Disability Insurance (SSDI)	<input checked="" type="checkbox"/>	Amount	<hr/> 100
Supplemental Security Income (SSI)	<input type="checkbox"/>		
Retirement Income from Social Security	<input type="checkbox"/>		
VA Non-Service Connected Disability Pension	<input type="checkbox"/>		
Pension or Retirement Income from a Former Job	<input type="checkbox"/>		
Temporary Assistance for Needy Families (TANF)	<input type="checkbox"/>		
General Assistance (GA)	<input type="checkbox"/>		
Alimony and Other Spousal Support	<input type="checkbox"/>		
Child Support	<input type="checkbox"/>		
Other Cash Income	<input type="checkbox"/>		
Total Cash Income for Individual			<hr/> 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.

NON-CASH BENEFITS

Receiving Non-Cash Benefits	Yes	▼
Supplemental Nutrition Assistance Program (SNAP)	<input checked="" type="checkbox"/>	
Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	<input type="checkbox"/>	
TANF Childcare Services	<input type="checkbox"/>	
TANF Transportation Services	<input type="checkbox"/>	
Other TANF-Funded Services	<input type="checkbox"/>	
Other Non-Cash Benefit	<input type="checkbox"/>	

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.

HEALTH INSURANCE

Covered by Health Insurance	Yes	▼
MEDICAID	<input checked="" type="checkbox"/>	
MEDICARE	<input type="checkbox"/>	
State Children's Health Insurance Program	<input type="checkbox"/>	
Veteran's Administration (VA) Medical Services	<input type="checkbox"/>	
Employer-Provided Health Insurance	<input type="checkbox"/>	
Health Insurance Obtained Through COBRA	<input type="checkbox"/>	
Private Pay Health Insurance	<input type="checkbox"/>	
State Health Insurance for Adults	<input type="checkbox"/>	
Indian Health Services Program	<input type="checkbox"/>	
Other Health Insurance	<input type="checkbox"/>	

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.

Test Client

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
  SSVF Test Project System	03/14/2018	Active	Group
 2110C Test Project System	03/13/2018	Active	Group

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.


PROGRAM: SSVF TEST PROJECT


Enrollment History **Provide Services** Assessments Notes Files Chart Forms ✕ Exit

Services


Assistance obtaining VA benefits

VA SSVF Service 

Educational assistance 

Start Date: 03/14/2018 

End Date:

03/14/2018 


Include group members:


Fake Client

Service Note

B Bold *I* Italic  Numbers  Bullets

SUBMIT

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.

The screenshot displays the 'Case Management for Lions' interface. At the top right, there is a 'Housing' link with an upward arrow. The main content area is titled 'Case Management' and contains several input fields: 'Start Date' (11/06/2017), 'End Date' (11/06/2017), 'Expense Amount' (10.00), and 'Expense Date' (11/06/2017). A dropdown menu for 'Funding Source' is open, listing options: 'Do Not Charge', 'No Funding Source' (which is selected and highlighted in blue), 'Private Funding', 'Funding Source 1', 'Funding Source 2', and 'Funding Source 3'. Below the dropdown is a 'Service Note' field with a rich text editor toolbar containing 'Bold', 'Italic', 'Numbers', and 'Bullets' buttons. A 'SUBMIT' button is located at the bottom right of the form.

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.

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*.

The screenshot shows a web application interface for 'Case Management for Lions'. At the top, there is a dark blue header with the word 'SERVICES' in white. Below this, the main content area has a light blue background. The title 'Case Management for Lions' is on the left, and 'Case Management ^' is on the right. The form itself is white and contains the following fields:

- Start Date:** 11/06/2017 (with a calendar icon)
- End Date:** 11/06/2017 (with a calendar icon)
- Expense Amount:** 10.00
- Expense Date:** 11/06/2017 (with a calendar icon)
- Funding Source:** No Funding Source (with a dropdown arrow)
- Time Tracking:** None (with a dropdown arrow)

Below these fields is a 'Service Note' section with a text area and a toolbar containing four buttons: 'B Bold', 'I Italic', '1= Numbers', and '•= Bullets'. At the bottom right of the form is a dark blue 'SUBMIT' button.

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.

The screenshot displays the 'CLIENT PROFILE' for 'Mufasa Lion'. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'SERVICES', 'ASSESSMENTS', 'NOTES', 'REFERRALS', 'LOCATION', and 'FILES'. The user is logged in as 'Zooney Keeper, Help Center Agency'. The profile fields include:

- Social Security Number: XXX - XX - 4589
- Quality of SSN: Full SSN Reported
- Last Name: Lion
- First Name: Mufasa
- Quality of Name: Full name reported
- Quality of DOB: Full DOB Reported
- Date of Birth: 12/12/1967, Adult Age: 49
- Middle Name: None
- Alias: Mufasa
- Gender: Male
- Race: White
- Ethnicity: Non-Hispanic/Non-Latino
- Veteran Status: No

A photo of a lion is shown with the unique identifier 'A06C25B35'. The 'Household Members' section lists:

Member Name	Relationship
Simba Lion	Son
Nala Lioness	Other
Scar Lion	Brother
Sarabi Lion	Wife
Rafiki Baboon	Uncle

The 'Active Programs' section lists:

- Pathways for Lions
- Maggie Cascade Test
- VA SSVF HP
- TEST Emergency Shelter Program
- Pride Lands Emergency Shelter

The 'Recent Services' section lists:

- Den Reservation :Long Term Den
- Cubs and Stuff Youth Shelter:Bed...

Buttons for 'SAVE CHANGES' and 'CANCEL' are at the bottom. An 'Audit Log' link is also present.

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.



CLIENT NOTES

Title: Goal Discussion
Agency: Help Center Agency
Date: 11/03/2017 Time Tracking: 1 hour 15 min

Note: 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

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*.

Mufasa Lion

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

CLIENT PROFILE

Social Security Number	XXX - XX - 4589	
Quality of SSN	Full SSN Reported	
Last Name	Lion	
First Name	Mufasa	
Quality of Name	Full name reported	
Quality of DOB	Full DOB Reported	
Date of Birth	12/12/1967	Adult. Age: 49
Middle Name	None	
Alias	Mufasa	
Gender	Male	
Race	White	
Ethnicity	Non-Hispanic/Non-Latino	
Veteran Status	No	

UNIQUE IDENTIFIER
A06C25B35

Household Members

- Simba Lion
- Nala Lioness
- Sarabi Lion
- Rafiki Baboon
- Pumba Warthog

Active Programs

- Pathways for Lions
- Maggie Cascade Test
- VA SSVF HP
- TEST Emergency Shelter Program
- Pride Lands Emergency Shelter

Recent Services

- Den Reservation :Long Term Den
- Cubs and Stuff Youth Shelter:Bed...

SAVE CHANGES CANCEL

Audit Log

Managed with Clarity Human Services

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.

Daisy Duck

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES LOCATION REFERRALS SERVICES

CLIENT PROFILE

 Public Alert: This client has been issued system-wide alert. Please review notes for full details. →

Social Security Number	XXX - XX - XXXX 
Quality of SSN	Client doesn't know 
Last Name	Duck
First Name	Daisy
Quality of Name	Full name reported 
Quality of DOB	Full DOB Reported 
Date of Birth	09/08/1967 Adult. Age: 50

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.

Daisy Duck

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

PROGRAM HISTORY

Edit

Program Name



Armory Emergency Shelter
Mercy House

PROGRAMS: AVAILABLE

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

Daisy Duck

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

PROGRAM: ARMORY EMERGENCY SHELTER

Enrollment History Provide Services Assessments Goals **Notes** Files Chart Forms × Exit

Client Program Notes ADD NOTE

Title	Staff	Date
Test Case Note Mercy House	Test Account	03/28/2018

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.

Help Center Agency

SEARCH FOR A CLIENT ADD CLIENT

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this system MUST be fictitious for security purposes.

Managed with Clarity Human Services Recover deleted data

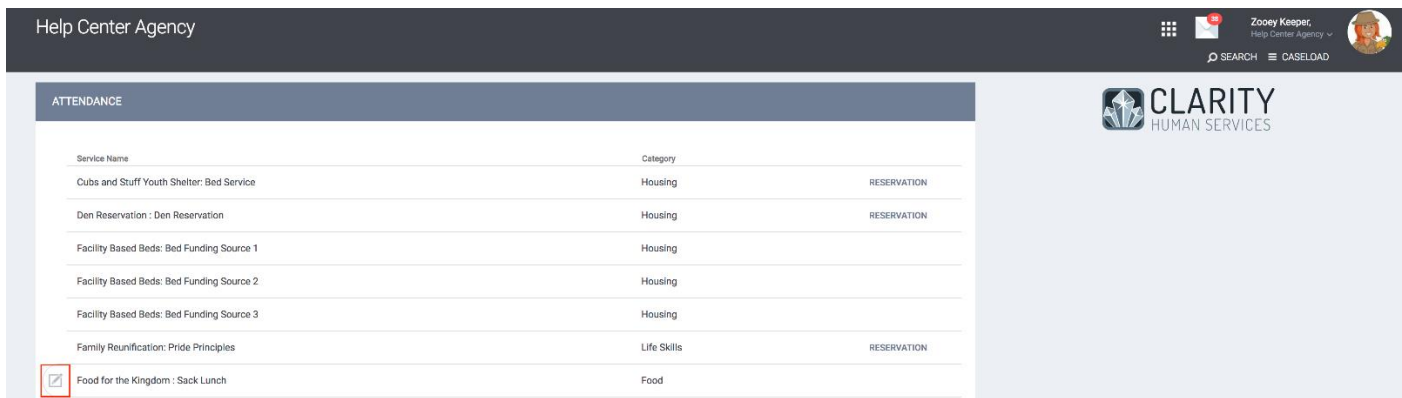
Your recent client searches:


- Mufasa Lion
- Marlin Clownfish
- Crush Turtle
- Chance Gardner
- Mag Mill

Zoeey Keeper, Help Center Agency

SEARCH CASELOAD REFERRALS

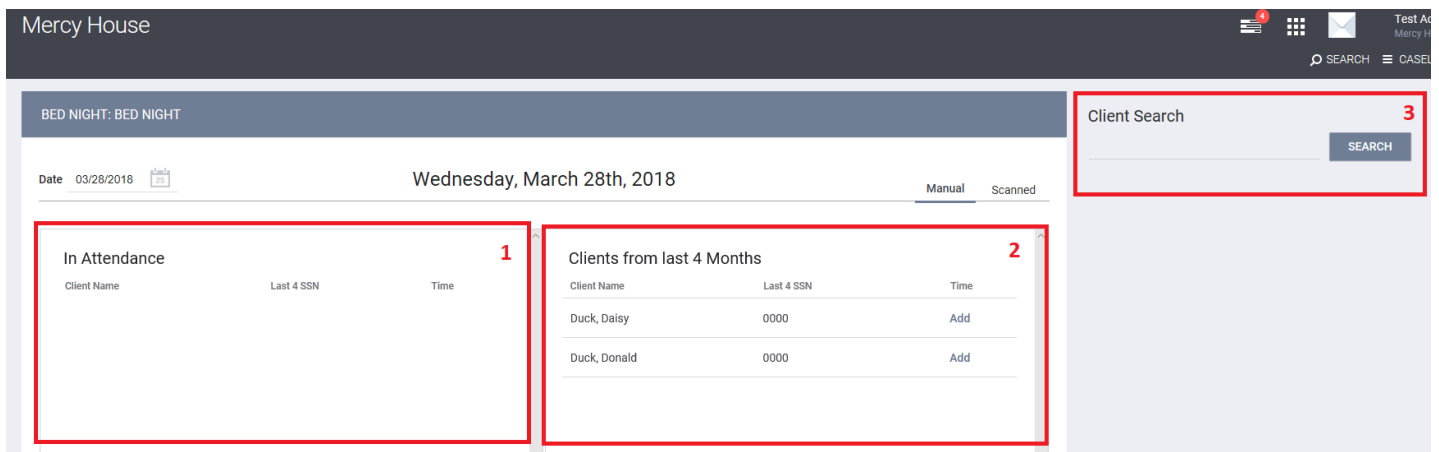
This will take you to the Attendance screen, where you will find a list of the attendance-based services in your agency. Select the Edit link that appears to the left of the service name you wish to modify or view.



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.

Mercy House Test Account, Mercy House TA

SEARCH CASELOAD

BED NIGHT: BED NIGHT

Date 03/27/2018 Tuesday, March 27th, 2018 Manual Scanned

In Attendance		
Client Name	Last 4 SSN	Time
Duck, Daisy	0000	06:30 PM 🗑️

Clients from last 4 Months		
Client Name	Last 4 SSN	Time
Duck, Daisy	0000	Add
Duck, Donald	0000	1 Add

Client Search SEARCH

Client's Name	Date of Birth	Last SSN		
Test2, Erin	06/16/1977	0000	2	Add

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.

Marlin Clownfish

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

CLIENT PROFILE

Social Security Number	XXX - XX - 7898	
Quality of SSN	Full SSN Reported	
Last Name	Clownfish	
First Name	Marlin	
Quality of Name	Full name reported	
Quality of DOB	Full DOB Reported	
Date of Birth	11/15/1980	Adult. Age: 36
Middle Name	None	
Alias		
Gender	Male	
Race	White, American Indian or Alaskan Native	
Ethnicity	Non-Hispanic/Non-Latino	
Veteran Status	No	

UNIQUE IDENTIFIER
FF9568AE1

Household Members Manage

Nemo Clownfish	Son
----------------	-----

Active Programs


Zazu's Food Pantry

Recent Services

Food for the Kingdom :Evening Meal

Facility Based Beds:Bed Funding...

Assigned Staff 1



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

Mickey Mouse

PROFILE HISTORY PROGRAMS ASSESSMENTS FILES SERVICES LOCATION

Erin DeRycke, System

SEARCH CASELOAD

CLIENT PROFILE

Social Security Number	XXX - XX - XXXX	
Quality of SSN	Client doesn't know	
Last Name	Mouse	
First Name	Mickey	
Quality of Name	Full name reported	
Quality of DOB	Full DOB Reported	
Date of Birth	09/09/1951	Adult. Age: 66
Middle Name	None	
Gender	Male	

UNIQUE IDENTIFIER
586181D88


Household Members Manage

Minnie Mouse	Wife
--------------	------

Active Programs

ESG Funded Emergency Shelter...

Assigned Staff 1



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.

Marlin Clownfish

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

PROGRAM: ZAZU'S FOOD PANTRY

Enrollment History Provide Services Assessments Goals Notes Files Chart Forms × Exit

Program Service History LINK FROM HISTORY

Service Name	Start Date	End Date
Food for the Kingdom :Evening Meal Help Center Agency	10/18/2017	10/18/2017

Reservation Service Referral

Managed with Clarity Human Services

21 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 10/18/2017

Assigned Staff: Zoey Keeper

Head of Household: Marlin Clownfish

Program Group Members +

Nemo Clownfish 10/18/17 10/31/17

Status Assessments +

10/19/2017 STATUS

Assessment due every year
Notification: ON

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.

Marlin Clownfish

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

PROGRAM: ZAZU'S FOOD PANTRY

Enrollment History Provide Services **Assessments** Goals Notes Files Chart Forms × Exit

Assessments LINK FROM ASSESSMENTS

Status Update Assessment	START
Annual Assessment	START
Dance ability	START
Supplies Given	START

21 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 10/18/2017

Assigned Staff: Zoey Keeper

Head of Household: Marlin Clownfish

Program Group Members +

Nemo Clownfish 10/18/17 10/31/17

Status Assessments +

10/19/2017 STATUS

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.

The screenshot shows the 'CLIENT PROFILE' page for Marlin Clownfish. The profile includes the following information:

- Social Security Number: XXX - XX - 7898
- Quality of SSN: Full SSN Reported
- Last Name: Clownfish
- First Name: Marlin
- Quality of Name: Full name reported
- Quality of DOB: Full DOB Reported
- Date of Birth: 11/15/1980 (Adult Age: 36)
- Middle Name: None
- Alias: (empty)

Additional details include a unique identifier FF9568AE1 and a list of active services: Employment:Employment for other..., Pride Lands Emergency Shelter, and Zazu's Food Pantry.

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.

The screenshot shows the 'PROGRAM: PRIDE LANDS EMERGENCY SHELTER' edit screen. A modal window titled 'SELECT CLIENTS TO EXIT FROM PROGRAM' is open, allowing the user to select household members to exit. The modal lists:

- Marlin Clownfish (Father)
- Nemo Clownfish (Son)

An 'END PROGRAM' button is visible at the bottom of the modal. The background shows program details such as Program Type (Group (2)), Program Start Date (11/08/2017), and Program Group Members (Nemo Clownfish, 11/08/17, Active).

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.

Marlin Clownfish

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

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

Other Cash Income

Total Cash Income for Individual 1000.00

NON-CASH BENEFITS

Receiving Non-Cash Benefits Yes

Supplemental Nutrition Assistance Program (SNAP)

Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

TANF Childcare Services

TANF Transportation Services

Other TANF-Funded Services

Other Non-Cash Benefit

HEALTH INSURANCE

Covered by Health Insurance No

OPEN SERVICES

Service Name	Start Date	End Date	Change End Date
Employment:Employment for other animals in the Kingdom Help Center Agency	11/09/2017	01/31/2018	11/09/2017

SAVE CHANGES CANCEL

Audit Log


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.

Help Center Agency

Zoey Keeper, Help Center Agency

SEARCH CASELOAD REFERRALS

SEARCH FOR A CLIENT ADD CLIENT (+)

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this system **MUST** be fictitious for security purposes.

Managed with Clarity Human Services Recover deleted data

Your recent client searches:

- Mufasa Lion
- Scar Lion
- Simba Lion
- Nala Lioness
- Sarabi Lion

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.

Help Center Agency

REPORT LIBRARY EXPLORE DATA ANALYSIS

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

HUD Reports	13 report(s) ↓
Administrator Reports	72 report(s) ↓
Housing	9 report(s) ↓
Email Reports	6 report(s) ↓
Program Based Reports	39 report(s) ↓
Service Based Reports	23 report(s) ↓
Agency Management	2 report(s) ↓
Agency Specific	86 report(s) ↓
Community and Referrals	8 report(s) ↓

Managed with Clarity Human Services

Processed Reports

No reports

Scheduled Reports

No reports

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.

The screenshot shows the 'Help Center Agency' report library. The top navigation bar includes 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. The user profile 'Zoey Keeper, Help Center Agency' is visible in the top right. The main content area is divided into two columns. The left column lists report categories: HUD Reports (13 report(s)), Administrator Reports (72 report(s)), and Housing (9 report(s)). Under the 'Housing' category, a list of reports is shown, each with a 'RUN' button and a 'SCHEDULE' button. One report, '[HSNG-103] Housing Inventory Report', is marked as 'Retired'. The right column is titled 'Processed Reports' and 'Scheduled Reports', both showing 'No reports'.

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.

This screenshot shows the 'Help Center Agency' report library with a different set of categories. The top navigation bar and user profile are the same. The main content area is divided into two columns. The left column lists report categories: HUD Reports (13 report(s)), Administrator Reports (72 report(s)), Housing (9 report(s)), Email Reports (6 report(s)), Program Based Reports (39 report(s)), Service Based Reports (23 report(s)), Agency Management (2 report(s)), Agency Specific (86 report(s)), and Community and Referrals (8 report(s)). The right column is titled 'Processed Reports' and 'Scheduled Reports', both showing 'No reports'.

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.

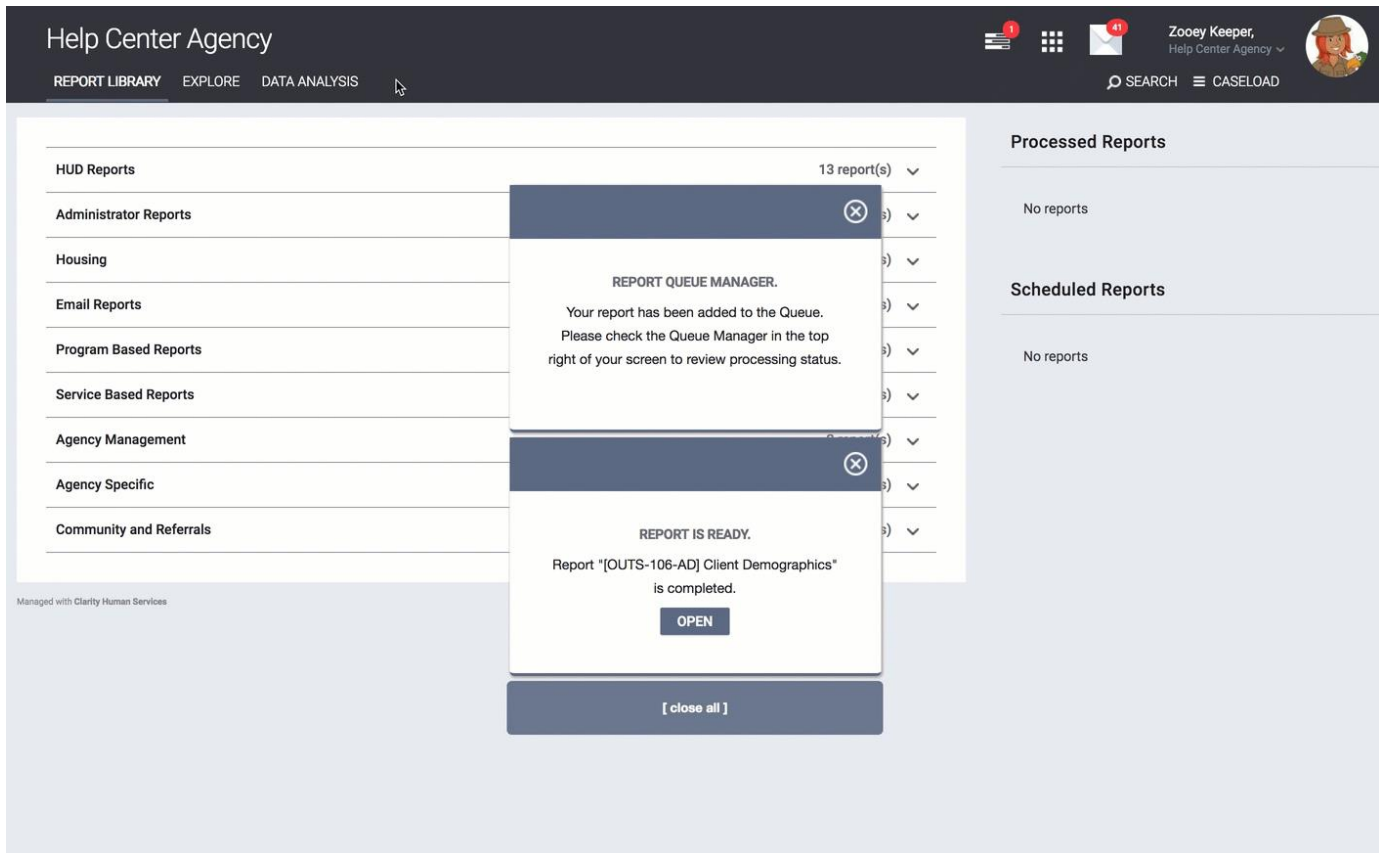
Every report will also ask you to select a report format. You can select Web Page, PDF, or Excel.

- 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.

The screenshot shows the 'Help Center Agency' interface. At the top, there are navigation links: 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. On the right, there is a user profile for 'Zoey Keeper, Help Center Agency' and a 'CASELOAD' button. Below the navigation, there is a table of report categories:

HUD Reports	13 report(s)
Administrator Reports	72 report(s)
Housing	9 report(s)
Email Reports	6 report(s)
Program Based Reports	39 report(s)
Service Based Reports	23 report(s)
Agency Management	2 report(s)
Agency Specific	86 report(s)
Community and Referrals	8 report(s)

Below the table, there is a section for 'Processed Reports' and 'Scheduled Reports', both showing 'No reports'. At the bottom left, there is a small text: 'Managed with Clarity Human Services'.

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