



HELP MANAGEMENT INFORMATION SYSTEM

Santa Cruz County Continuum of Care

2018

Emergency Shelter- Attendance

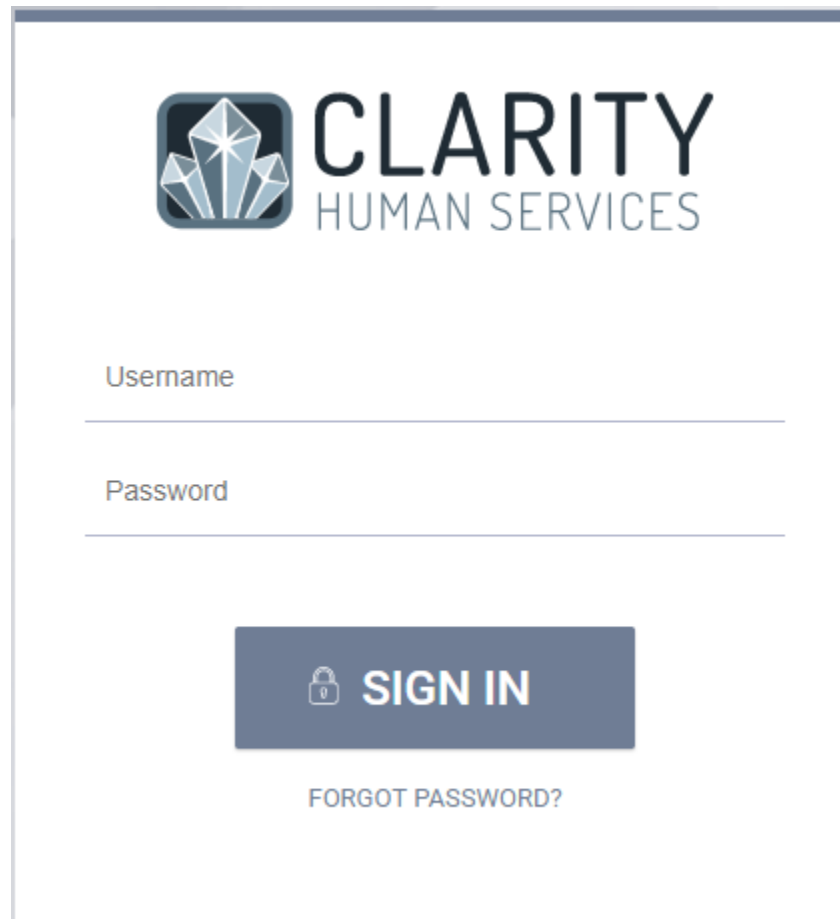



© Community Technology Alliance
1080 Minnesota Ave, Suite 1
San José, CA 95125
Phone 408.437.8800 • Fax 408.437.916

Access HMIS Web Portal

Access the **Santa Cruz HMIS** portal at: www.ctagroup.org/santa-cruz-hmis/


Enter given Username and temporary Password, then click *Sign In*.
If no temporary password was given, click on *Forgot Password* (see page 4).





Username

Password

 **SIGN IN**

[FORGOT PASSWORD?](#)

Temporary Password- Password Change

Upon logging in, you will need to set your own password. Set your password then click *Save Changes*.

PASSWORD CHANGE REQUIRED

The password for your account has expired. Please change your password.
Your password should be 8 characters or longer, and be a combination of all four of the following

- * English uppercase characters (A through Z)
- * English lowercase characters (a through z)
- * Numerals (0 through 9)
- * Non-alphabetic characters (such as !,\$,#,%)

Password can't contain username, can't be a take on the word "clarity", can't be the same one as before.

Email	Training1@training.com
Password	
Confirm Password	

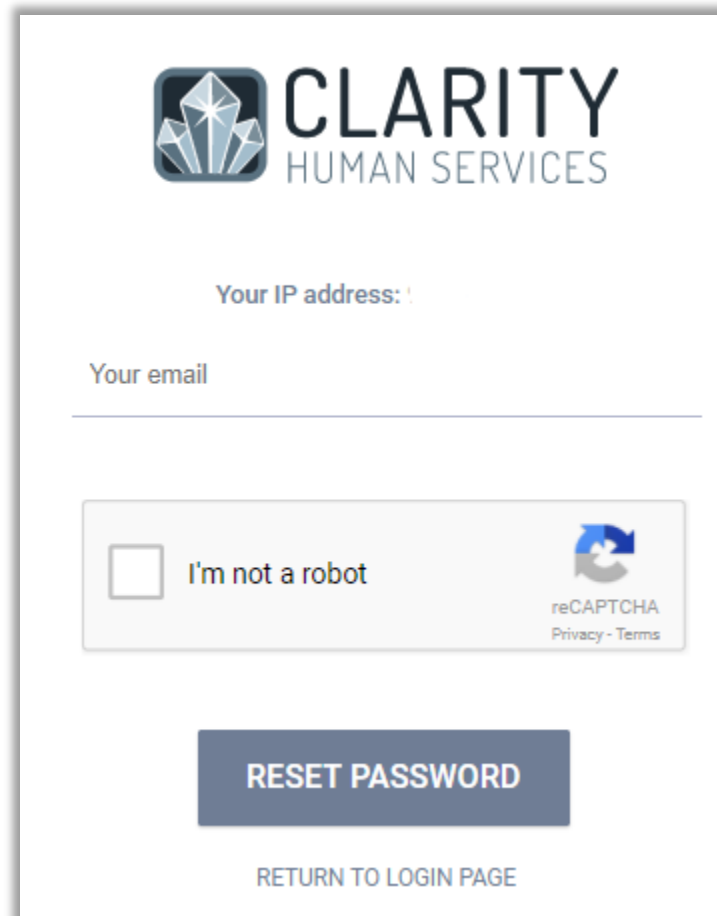
SAVE CHANGES

Forgot Password/Reset Password

If a user forgets their password or need to reset the password:

Enter user's e-mail, click on the check box *I'm not a robot*, then click *Reset Password*.

User will now be notified by email with a link and how to reset the password.



The screenshot shows a web form for password reset. At the top is the Clarity Human Services logo, which consists of a blue square icon with white geometric shapes and the text "CLARITY HUMAN SERVICES" to its right. Below the logo, the text "Your IP address: !" is displayed. Underneath is a text input field labeled "Your email" with a horizontal line below it. A light gray box contains a checkbox labeled "I'm not a robot" and a reCAPTCHA logo with the text "reCAPTCHA Privacy - Terms" below it. At the bottom of the form is a dark blue button with the text "RESET PASSWORD" in white. Below the button is a link that says "RETURN TO LOGIN PAGE".

User Policy Agreement- Signature

A *User Policy Agreement* screen appears on the next screen after logging in. Read and check off all the Policy Agreement, then click *Save*.

USER POLICY AGREEMENT

Agency User recognizes the primary focus in the design and management of the Bay Area HMIS is to address the needs of clients. This includes both the need to continually improve the quality of homeless and housing services, and the need to maintain client confidentiality by treating personal data with respect and care.

As the guardians entrusted with this personal data, Bay Area HMIS users have a moral and legal obligation to ensure that appropriate methods are practiced with the collection, access, and utilization of data. Each user is responsible to make sure that client data is only used for the purpose for which it is collected. Proper user training, adherence to the Bay Area HMIS policies and procedures, and a clear understanding of client confidentiality are vital to achieving these goals.

It is a client's decision about which information, if any, entered into HMIS shall be shared and with which Partner Agencies. The client Release of Information (ROI) shall be signed if the client agrees to share information with Partner Agencies.

- My user ID and password are for my use only and must not be shared with anyone.
- I must take all reasonable means to keep my password physically secure.
- I understand that the only individuals who can view information in HMIS are authorized users and the clients to whom the information pertains.
- I may only view, obtain, disclose, or use the database information that is necessary to perform my job
- If I am logged into HMIS and must leave the work area where the computer is located, I must log off HMIS before leaving the work area.
- Failure to log off HMIS may result in a breach in client confidentiality and system security.
- Hard copies of HMIS information must be kept in a secure file.
- When hard copies of HMIS information are no longer needed, they must be properly destroyed to maintain confidentiality.
- If I notice or suspect a security breach, I must immediately notify the Agency Administrator and/or Community Technology Alliance.

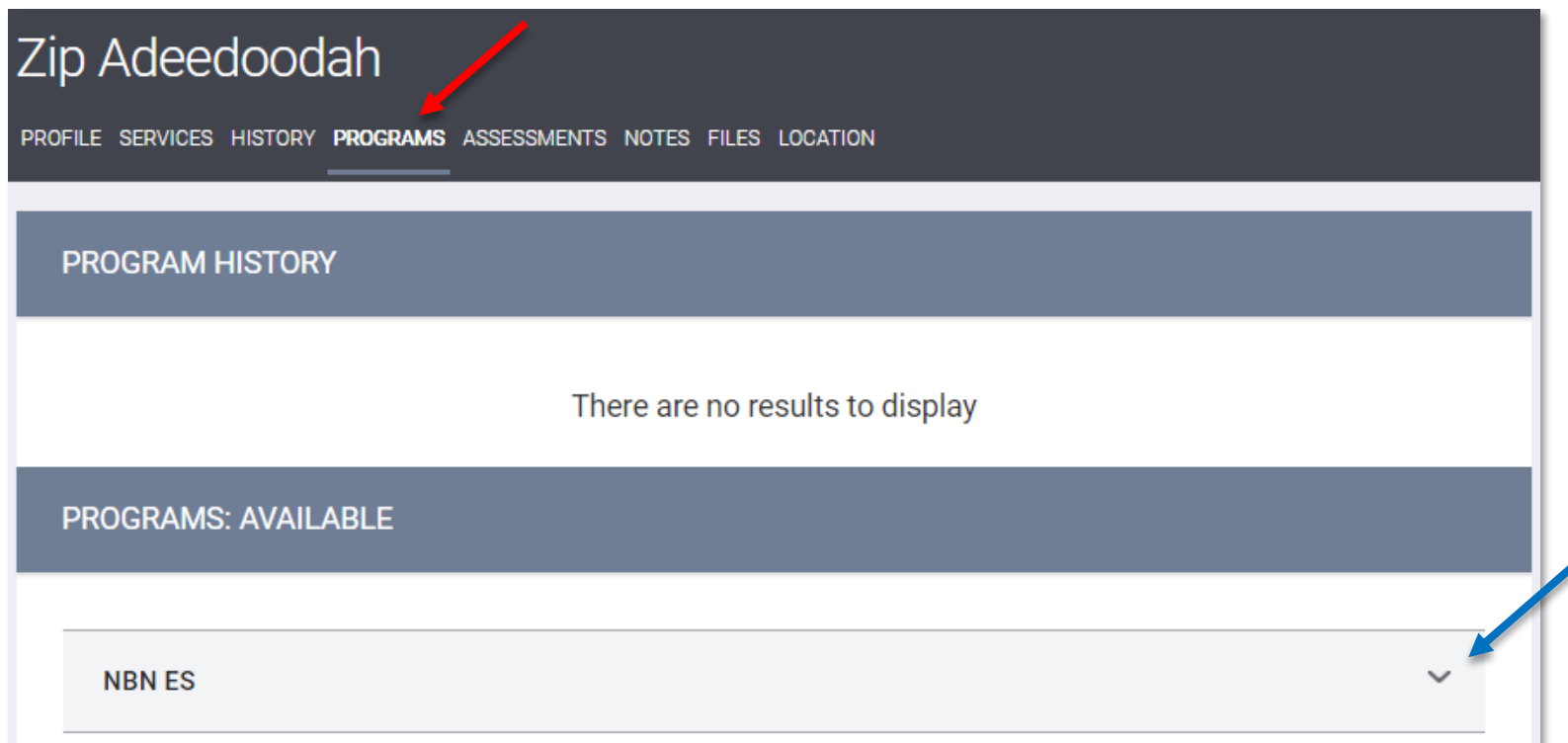
User Code of Ethics:

- HMIS users must treat Partner Agencies with respect, fairness and good faith.
- Each user should maintain high standards of professional conduct in the capacity as a HMIS user.
- The user has primary responsibility for his/her client(s).

Program Enrollment

To provide a service, the client will need to be enrolled into a program.

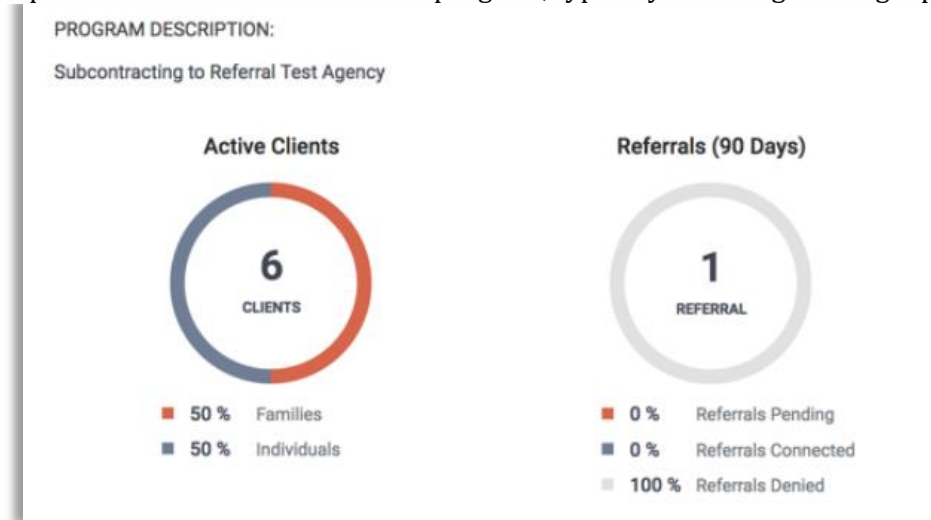
To enroll a client/household into a program, click on *Programs* tab- top menu of the client record (red), select the drop down arrow (blue) next to the applicable program title under *Programs: Available*.



The screenshot displays a client record interface for "Zip Adeedoodah". At the top, a dark navigation bar contains the client name and a menu with tabs: PROFILE, SERVICES, HISTORY, PROGRAMS (highlighted with a red arrow), ASSESSMENTS, NOTES, FILES, and LOCATION. Below this, a section titled "PROGRAM HISTORY" shows "There are no results to display". The "PROGRAMS: AVAILABLE" section contains a single entry, "NBN ES", with a blue arrow pointing to a small downward-pointing chevron icon on the right side of the entry.

Program Enrollment-Continued

The program description provides a brief overview of the program, typically including the target population(s) and general service(s).



Funding Source
HUD:CoC – Permanent Supportive Housing

Availability
Limited Availability

Service Categories:

- Housing
- Employment

This section indicates the categories of the different services this program provides (e.g. [APR] Transportation, [QPR] Rental Assistance).

Include group members:

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

If your client is part of a household/family, you will be automatically prompted to select family/household members to include in the program. It is important to note that you must have already created a family/household to have this feature. Click on the switch, the blue indicates on.

Program Enrollment- Continued

ENROLL

After clicking *Enroll* icon, you will be taken to the Program Enrollment page for your original client. This page will present program specific data element necessary to complete the program enrollment.

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 screenshot shows the 'Enroll Program for client Rafiki Baboon' page. The form includes the following fields:

- Project Start Date: [Calendar icon]
- Relationship to Head of Household: [Select]
- DISABLING CONDITIONS AND BARRIERS:
 - Disabling Condition: [Select]
 - Physical Disability: [Select]
 - Developmental Disability: [Select]
 - Chronic Health Condition: [Select]
 - HIV - AIDS: [Select]
 - Mental Health Problem: [Select]
 - Substance Abuse Problem: [Select]
- HEALTH INSURANCE:
 - Covered by Health Insurance: [Select]

At the bottom of the form, there are two buttons: 'SAVE & NEXT' (highlighted with a red box) and 'CANCEL'. On the right side, there is a sidebar with the following information:

- ENROLLING PROGRAM:
 - Program Type: Group (2)
 - Assigned Staff: [checkbox]
 - Head of Household: [text field]
- Program Group Members (highlighted with a red box):
 - Nala Lioness

The top navigation bar includes 'Rafiki Baboon', 'PROFILE', 'HISTORY', 'PROGRAMS', 'SERVICES', 'ASSESSMENTS', 'NOTES', 'REFERRALS', 'LOCATION', 'FILES', 'Zoey Keeper, Help Center Agency', 'SEARCH', and 'CASELOAD'.

Working with Dynamic Data Fields

When you enroll your client in the program, you will notice dynamic data fields in the enrollment form. The dynamic intake forms powered by Clarity provide many flexible features. Individual data elements can be Required, Soft Required or Not Required.

Note: Some data fields may already be completed due to cascade enrollment data feature set in Clarity; it allows information to pre-fill client's information based on previous enrollment values within set amount of days. End users still need to make sure that the client's information is accurate and up to date.

Required

The data element must be completed; this will not allow you to save the page unless a value is set. A red banner is set across the top of the page, and the data element is outlined in red.

Soft Required

The data element is optional, but highly recommended. The data will allow you to continue; a yellow banner will appear and the field in question will be outlined in yellow.


Not Required

The data element is requested as a part of the form but is completely optional for data entry. No notice is provided.

Complete all necessary fields, and click *Save & Next* at the bottom of the page to create the client enrollment. If you have selected additional family/household members to include, you will be presented with an enrollment for each client.

Program Enrollment- Data Intake

Enroll Program for client Big Bird

Project Start Date	01/01/2018	
Relationship to Head of Household	Self (head of household) <input type="button" value="v"/>	
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response) <input type="button" value="v"/>	
LIVING SITUATION		
Type of Residence	Rental by client, no ongoing housing subsidy <input type="button" value="v"/>	
Length of Stay in Prior Living Situation	One week or more, but less than one month <input type="button" value="v"/>	
Length of Stay Less Than 7 Nights	No <input type="button" value="v"/>	
DISABLING CONDITIONS AND BARRIERS		
Disabling Condition	Yes <input type="button" value="v"/>	
Physical Disability	Yes <input type="button" value="v"/>	Long Term <input type="button" value="Select"/> <input type="button" value="v"/>
Developmental Disability	Yes <input type="button" value="v"/>	Substantially Impairs Independence <input type="button" value="Select"/> <input type="button" value="v"/>
Chronic Health Condition	Yes <input type="button" value="v"/>	Long Term <input type="button" value="Select"/> <input type="button" value="v"/>
HIV - AIDS	Yes <input type="button" value="v"/>	Substantially Impairs Independence <input type="button" value="Select"/> <input type="button" value="v"/>
Mental Health Problem	Yes <input type="button" value="v"/>	Long Term <input type="button" value="Select"/> <input type="button" value="v"/>
Substance Abuse Problem	Both Alcohol <input type="button" value="v"/>	Long Term <input type="button" value="Select"/> <input type="button" value="v"/>
Domestic Violence Victim/Survivor	Yes <input type="button" value="v"/>	Last Occurrence <input type="button" value="Select"/> <input type="button" value="v"/>
Are you currently fleeing?	No <input type="button" value="v"/>	

*Tool tip: when hovered over a certain question, a short description will appear.

Based on the type of answer given, the field will expand for more selections. i.e.) If the client said yes to *Physical Disability* it will prompt another field: *Long Term* and the options of *Yes*, *No*, *Client doesn't know*, *Client refused*, or *Data not collected* can be selected.

Program Enrollment- Data Intake- Cash Income

CASH INCOME FOR INDIVIDUAL	
Income from Any Source	Yes
Earned Income	<input checked="" type="checkbox"/> Amount 150
Unemployment Insurance	<input type="checkbox"/>
Worker's Compensation	<input type="checkbox"/>
Private Disability Insurance	<input checked="" type="checkbox"/> Amount 100
VA Service-Connected Disability Compensation	<input type="checkbox"/>
Social Security Disability Insurance (SSDI)	<input type="checkbox"/>
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	250.00

If *Income from Any Source* is selected *Yes*, this will prompt other cash income.

Click the switch to enter client's source of earned income.

If the client has multiple source, the *Total Cash Income for Individual* (*red*) will auto calculate the total amount.

Manage Client Attendance from Attendance Screen

Enter client's (if applicable) *Non-Cash Benefits* and *Health Insurance* then click Save & Close
Click on the Launcher menu (red) and select the *Attendance* icon (blue). This will take you the Attendance screen.


The screenshot displays the Agency A software interface. At the top left, the text "Agency A" is visible. Below it is a search bar with the placeholder text "SEARCH FOR A CLIENT" and a "SEARCH" button. A red arrow points to a grid icon (the Launcher menu) in the top right corner. A blue arrow points to the "ATTENDANCE" icon in the navigation menu that appears below the Launcher menu. The navigation menu also includes "REPORTS" and "CALENDAR" icons. Below the search bar, there is a list of search results: "Little Bird", "Prince Charming", "Michael Jackson", and "Zip Adeedoodah". The text "Managed with Clarity Human Services" is visible at the bottom left of the interface.

Attendance Screen

From the Attendance Screen, you will find a list of the attendance-based services in your agency. Select the *Manage* (red) icon that appears to the left of the service name you wish to modify or view. After selecting *Manage*, you will be taken to the attendance screen for that particular service.

ATTENDANCE		
Service Name	Category	
Bed Night: Bed Night	Housing	RESERVATION
 Dining Hall: Breakfast	Food	
Dining Hall: Dinner	Food	
ES NBN Bed Night: Adult Only Bed	Housing	
Motel and Hotel Vouchers: Bed Service	Motel and Hotel Vouchers	RESERVATION
Personal Care: Water Bottle	Life Skills	
		6 Services

Service Attendance Screen

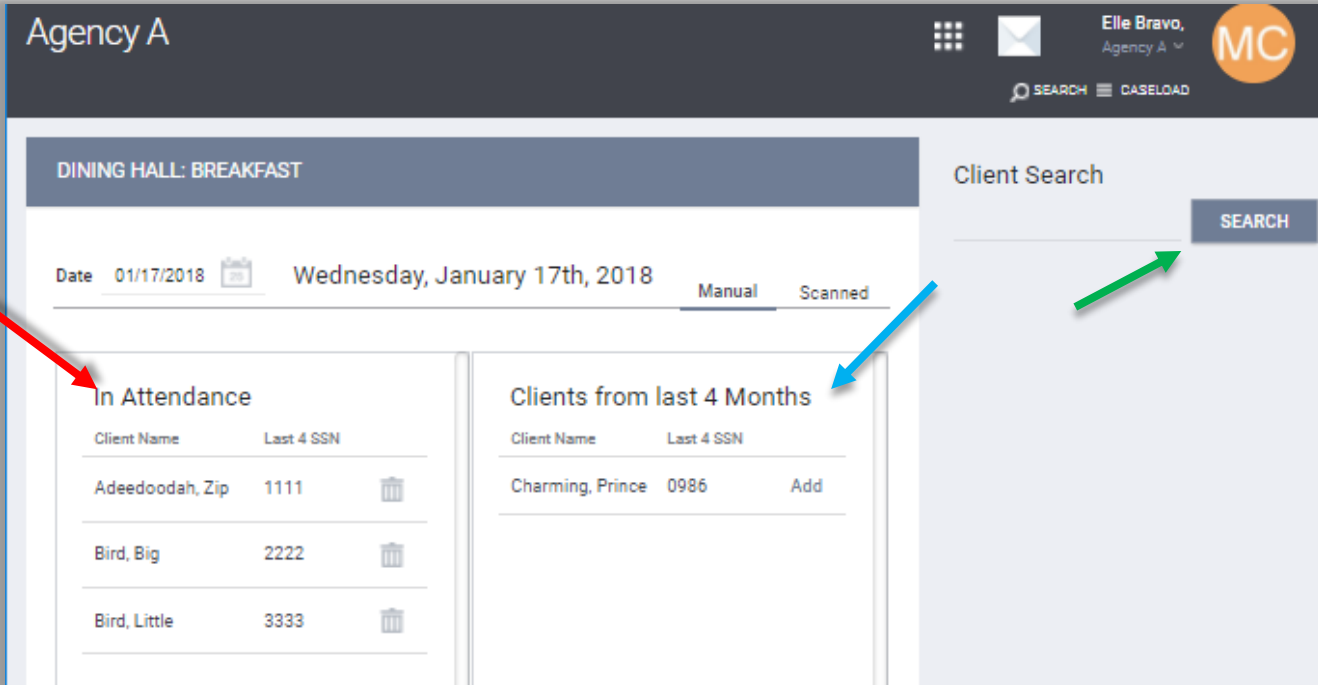
Service Attendance Screen will automatically default to the current date. You can change the date by selecting the calendar  icon. The Screen will adjust to list the attendance information for the given date.

In Attendance (red)

This is where you will place the clients who received the service on the given date.

Clients from last 4 Months: (blue)

Lists of clients who have received the service at any point in time during the past 4 months.



Agency A

Elle Bravo, Agency A


MC

SEARCH CASELOAD

DINING HALL: BREAKFAST




Client Search

SEARCH

Date 01/17/2018  Wednesday, January 17th, 2018

Manual Scanned

In Attendance

Client Name	Last 4 SSN	
Adeedoodah, Zip	1111	
Bird, Big	2222	
Bird, Little	3333	

Clients from last 4 Months

Client Name	Last 4 SSN	
Charming, Prince	0986	Add

Client Search: (green)

You can search a client here based on the client search guideline. This will display the clients who have not received the service within the last 4 months.

Documenting Client Attendance

There are three ways to document client attendance:

- Add Names from Client List
- Client Search Box
- Unique Identifier Scan Upload

Add Names from Client List


To manually *check in* a client, select *Add* link (red) next to their name as it appears in the database of names to the right. Client count on the bottom of the Service Attendance screen (blue) will change accordingly and in real time.

**When the client is placed in this area, a service record is automatically saved to the client.*



This service can be viewed in the client's history tab.

If necessary, you can move the client from the daily attendance list by selecting the trashcan icon (green) next to the client's name. This will return the client to the database of names; it will not completely delete them from the list.

DINING HALL: BREAKFAST

Date 01/17/2018  Wednesday, January 17th, 2018 Manual Scanned

In Attendance

Client Name	Last 4 SSN	
Bird, Big	2222	
Bird, Little	3333	


2 Clients

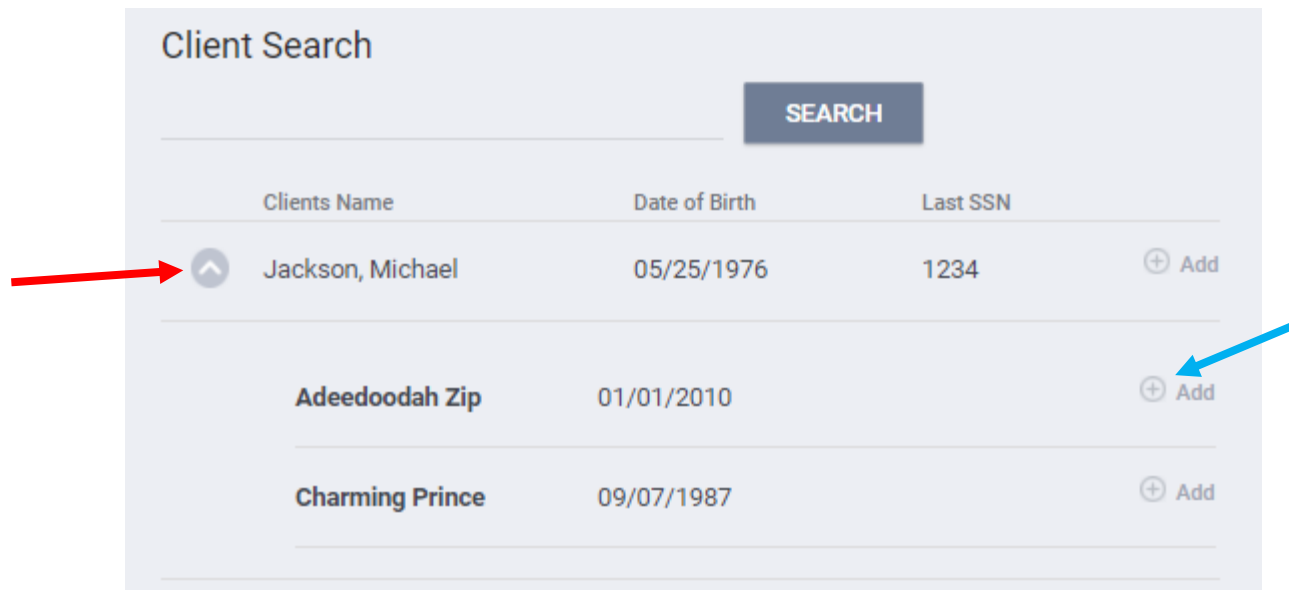
Clients from last 4 Months

Client Name	Last 4 SSN	
Adeedoodah, Zip	1111	Add
Charming, Prince	0986	Add

2 Clients


Client Search Box

Use the *Client Search Box* to add a client who has not received the service during the last 4 months, or to check in multiple household. To add members of a household, select the  icon to the left of the client name (red). A list of their associated household members will drop down. Select *Add* (blue) to check in these household members.



**If the service transaction requires a program enrollment, the Attendance Tool will not allow clients who are not enrolled in the program to be checked in. Message will say:*

Not Enrolled

 (green) Client received the service at any point in time during the past 4 months but is no longer enrolled in the Program.

