Clarity HMIS Select Workflow

Enrolling Clients in Clarity HMIS

1. If client is already in HMIS, make sure that their client profile is up-to-date.
2. Go to client's **Programs** tab.
3. Under Programs, click on the correct Program to enroll your client(s).
4. If enrolling the household members, toggle on household members under **Include group members** to include them in the enrollment and click **Enroll**.
5. Complete Client Program Enrollment.
   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 a year. End users still need to make sure that the client's information is accurate and up to date.
   - Emergency Shelter Night-by-night (ES NBN) and Street Outreach (SO) programs: Remember to enter **Date of Engagement** if any.
   - Permanent Housing Project: Remember to record **Housing Move-In Date** to which a client or household moves into a permanent housing unit.

Annual Status Notification

If you would like to receive an email notification of when your client's **Annual Status Assessment** is due for the program, the status notification must be **On**. This is located in the bottom right of the client's selected program.

1. Click on the edit icon near **Assessment due every year Notification** on the corner right of the screen.
2. In **CHANAGE CASE STATUS,** toggle on (blue) **Assessment Due Warning**.
3. Select the timeframe to which you would like the email to be sent. For example, if you select **1 Week**, you will receive the notification in your email 1 week prior to the status assessment due date for your client.

Program Status Update/Annual Assessment

Status Update Assessment: Conduct this assessment if client has any changes to disability types, income, benefits, or health insurance that occur while enrolled in the program.

Annual Status Assessment: Clients participating in a project one year or more requires an Annual Assessment. This assessment must be collected no more than 30 days before or after the anniversary of the head of household's Project Start Date; annual assessments are based solely on the head of household's anniversary date. All household members in the enrollment must have the annual assessment at the same time.

1. Go to **Programs** in the client profile and select the program you wish to add a status assessment by clicking the edit pencil icon.
2. In the client's program, click **Assessments.**
3. In Program Assessments you will see **Status Update Assessment** and **Annual Assessment**. Click **Start** on the appropriate assessment type (see definitions above).
4. Remember to toggle on (blue) any household members if any are included in the program and click **ADD STATUS ASSESSMENT**.
5. Add or edit any new changes that have occurred.
6. Complete all members of household then Click **Save & Close**.
7. All status updates or annual assessments completed are located below the **Assessment History.** If any information were incorrect at the time, you may edit the status updates by clicking the edit icon.

Project Exit

When a client is no longer considered to be participating in the project, the user must exit the client(s) from the program.

Residential projects: This date represents the last day of a continuous stay in the project before the client transfer to another residential project or otherwise stops residing in the project.
Non-residential projects: Exit date must represent the last day the last day a service was provided or the last date of a period of ongoing service. Projects must have a clear and consistently applied procedure for determining when a client who is receiving supportive services is no longer considered to be participating in the project.

If a client uses a service for just <u>one day</u> (i.e., starts and stops before midnight of same day), then the Project Exit Date may be the same as the Project Start Date.

1. To exit a client and the household, go to the client's program.
2. Click on **x Exit**
3. Toggle on (blue) members of the household who are exiting from the program if needed.
4. Enter the **Project Exit Date.** Each household member may have separate exit dates, destinations, etc.
5. For **Destination** question, please chose the appropriate client response.

Case Manager Referral Steps:
To manage the clients that are referred and assigned to you.

1. Check your Clarity inbox for the referral message your manager sent you or click on **CASELOAD** below your name on the top right of the screen**.**
2. Then click **Case Manager**. Below will list all the clients that were referred and assigned to you.
3. Remember your client that you will enroll and their program that they were referred to.
4. Go to your client's file.
5. **Enroll** your client into the referred program.
6. The '***Program Placement a result of Referral provided by (name of agency)***' message will appear on the left corner if the program is conducted as a result of a referral. Not having this message means you may be enrolling them into the wrong program or the program that was not based on a referral.
7. Toggle on members in **Include Household Members** if you are enrolling the household.
8. Click **Enroll** and enter client's intake.

Please refer to HMIS Data Standards Manual for more in depth information.

HMIS Data Standards Manual: provides a review of all Universal Data Elements, Project Descriptor Data Elements, and Common Program Specific Data Elements. It contains information on data collection requirements, instructions for data collection, and descriptions that the HMIS User will find as a reference.
https://www.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf

Should you have any HMIS related questions feel free to submit a ticket.

Helpdesk Request: https://ctagroup.org/santa-cruz-hmis/scz-request-help/