Homeless Management Information System

Santa Cruz County Continuum of Care

2019

Clarity HMIS workflow

YHDP Adding New Clients

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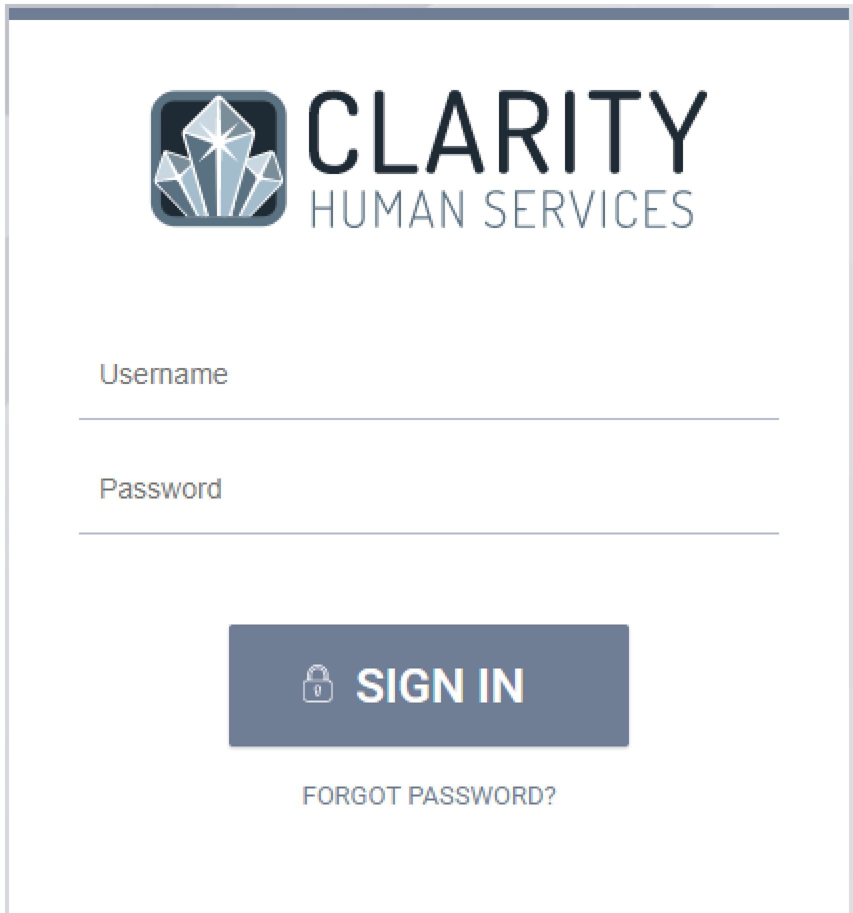
Contents

Access HMIS Web Portal

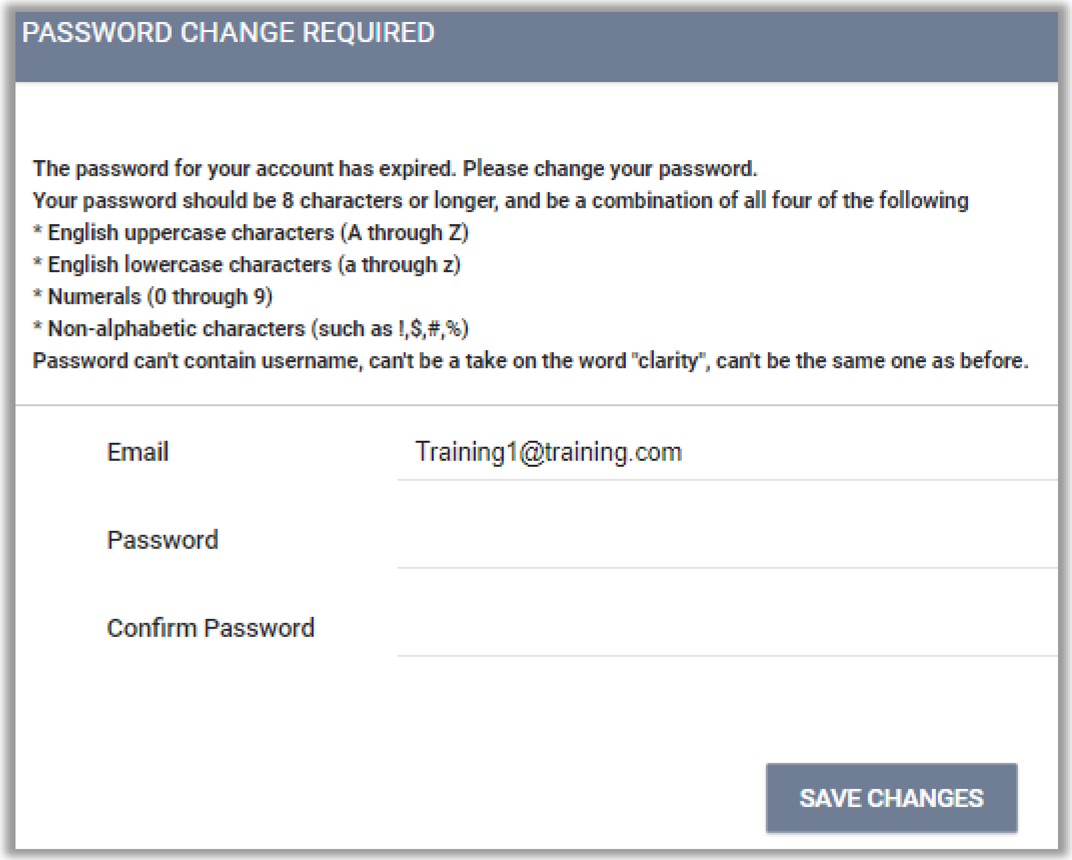
Access the **Santa Cruz HMIS** portal at: www.ctagroup.org/santa-cruz-hmis/

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



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

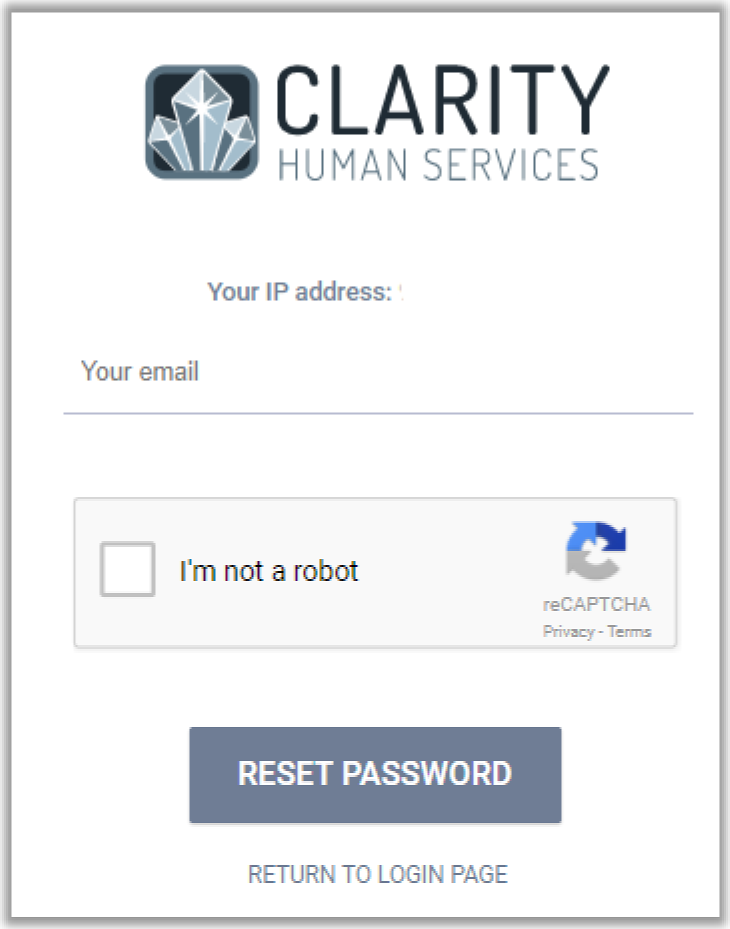
Password

Confirm Password

SAVE CHANGES

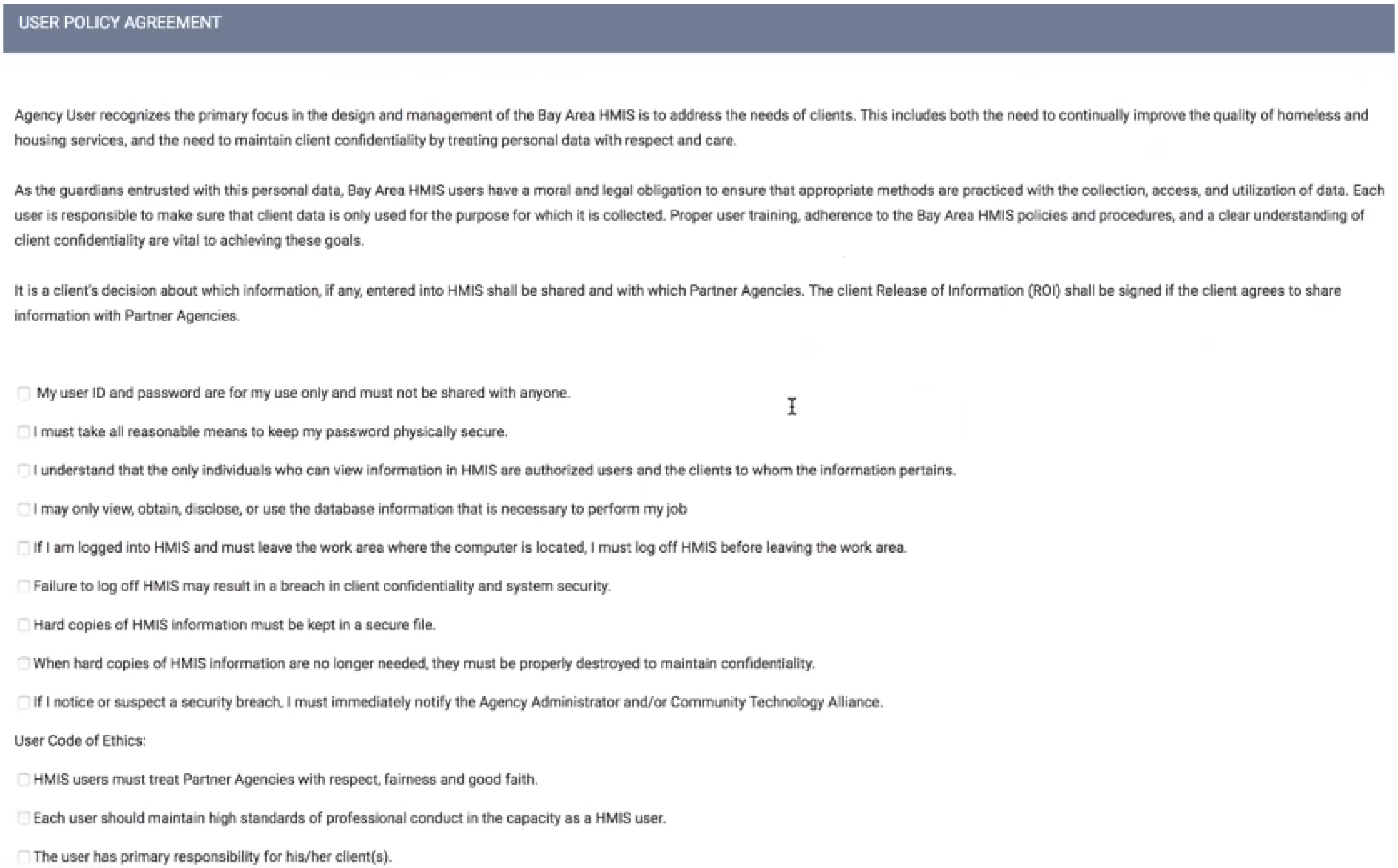
Forgot Password/Reset Password

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.



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).

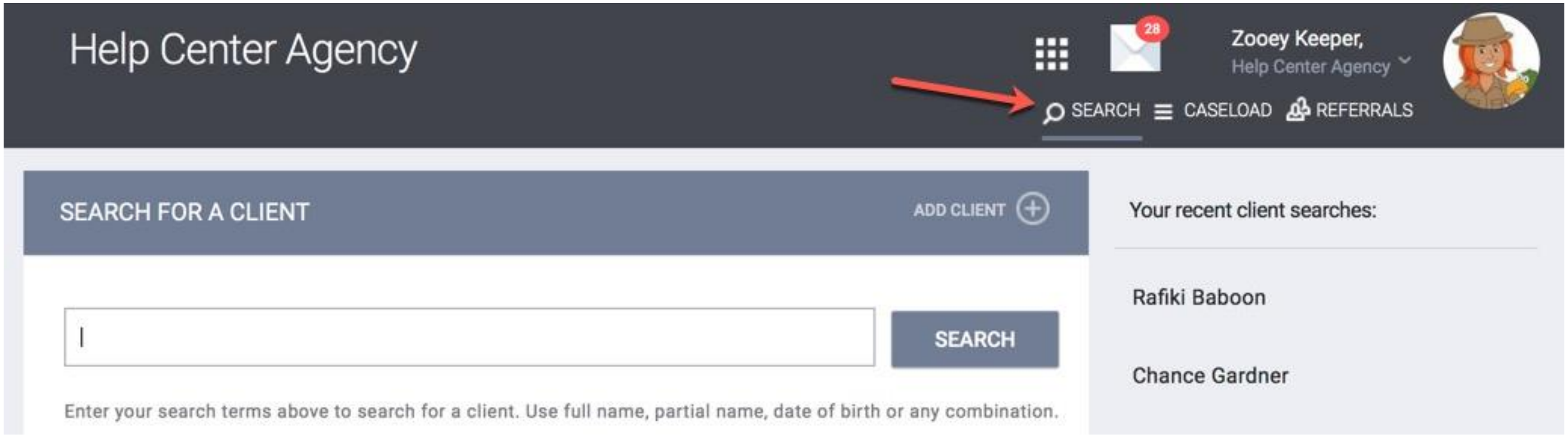
Search for Clients

Search Clients in your client database.

After logging into Clarity Human Services, you are placed at the center hub of the system which provides access to your clients with the Search tab.

To make sure that the client does not exist in the data base, search for the client before entering and creating a new file.

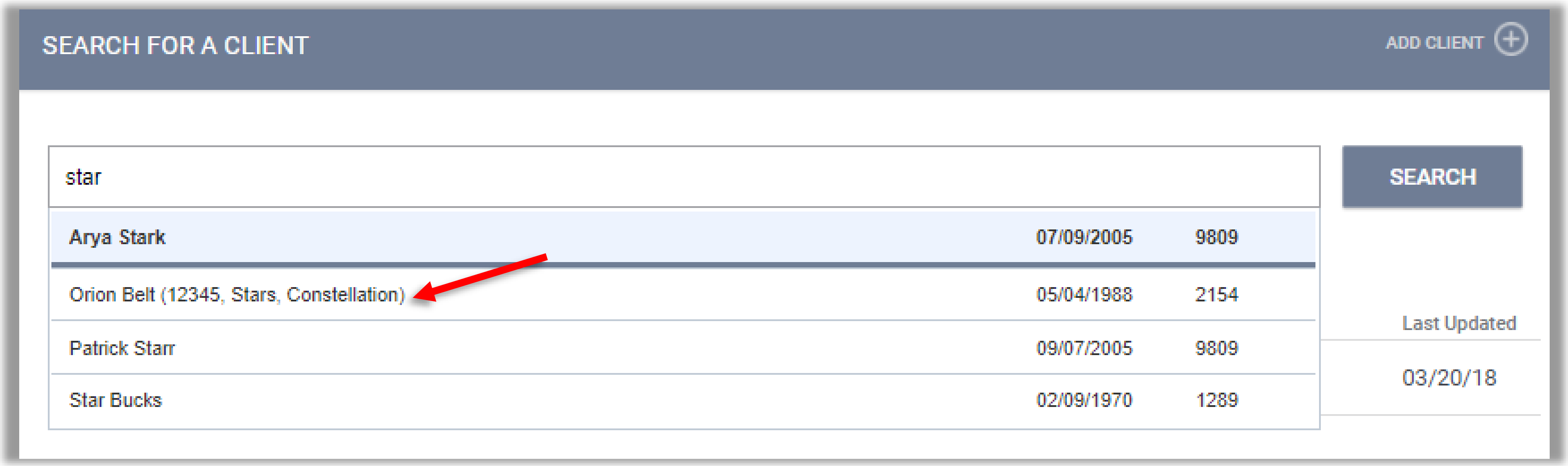
User's last five client search will display under *Your recent client searches* located on the right.



Search for Clients by Name Aliases, Maiden Names, Nicknames, or SSN

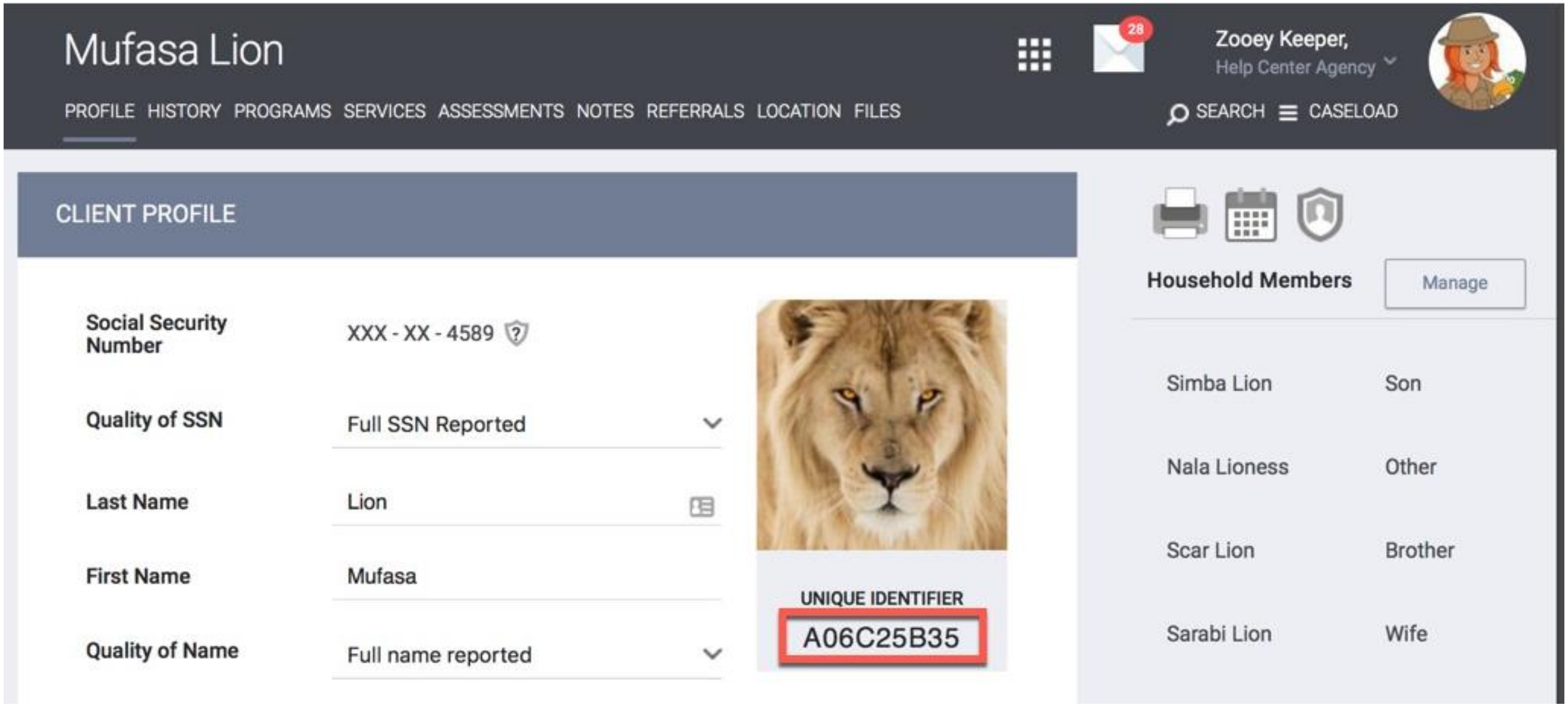
When searching for a client, you can enter the first three letter of first and last names. Clarity has auto-suggest mechanism to find clients with a name that is difficult to spell.

The search feature allows you to enter a list of names a client goes by known as *Alias*. If the client goes by a different name than what is given when searched, update and enter the client's Alias name in client profile. If the client has multiple Aliases, they are separated by commas (red).



Search for Clients by Unique Identifier

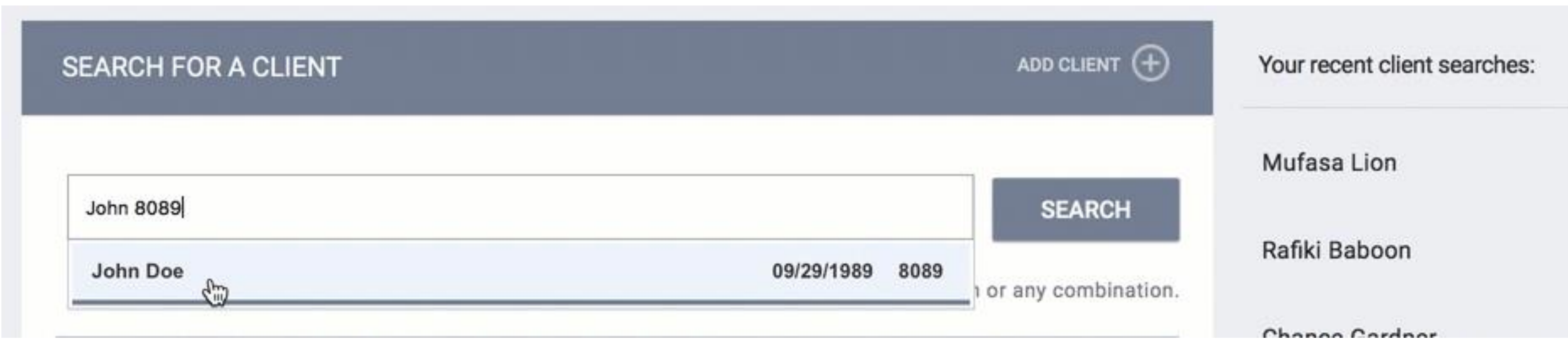
Every client created in Clarity is issued a Unique Identifier, which is 9 characters in length. Searching based on the Unique Identifier will take you directly to the Client's profile screen, bypassing the need to search through the auto-suggest list.



Refining Your Search

As the client database grows, you may find that the results listed can be large for a common name (e.g. John).

You can refine your search by combining your search terms until the result is shorter, or you find your given client. For example, a search term of "John 8089" will search for a combination of a partial First Name, Last Name, and the last four digits of the Social Security Number.

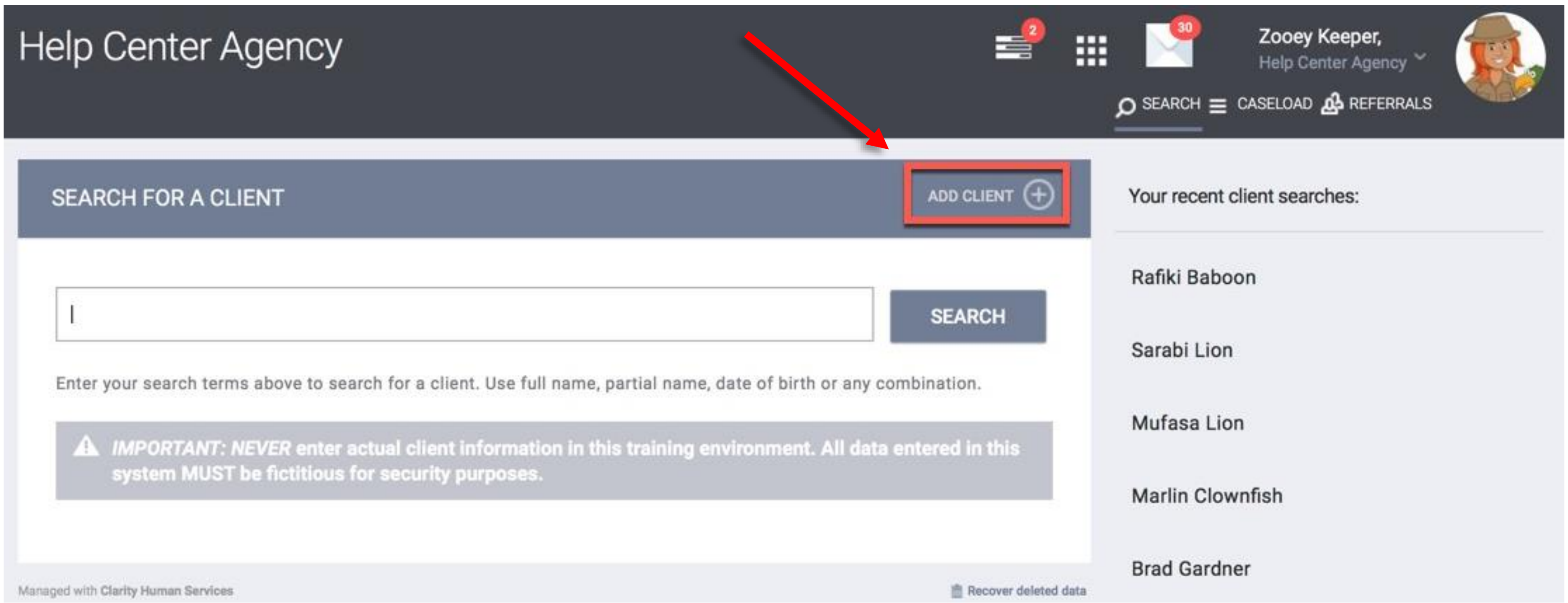


Creating New Client Profile

If after a thorough search, you have determined that your client does not exist in the system, click *Add Client* in the upper right corner of the Search screen.

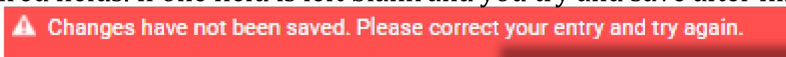
This will take you to Client Profile creation page.

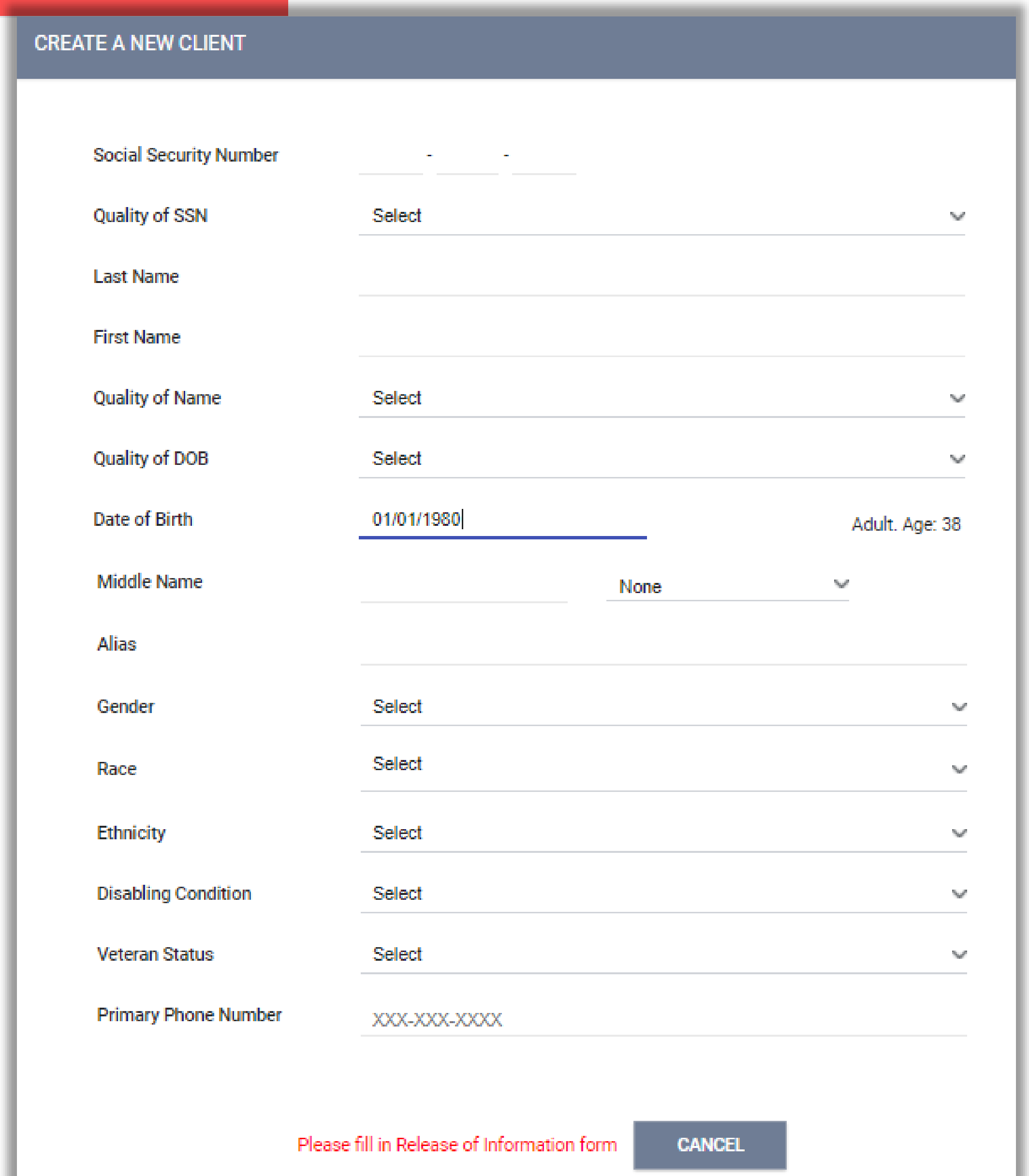
Note: It is by default that Clarity will assign the user who enrolls the client into the Agency Program as the Case Manager (Assigned Staff). To change Case Manager (Assigned Staff) go to page (54).



Creating New Client Profile- Core Data Fields

The first fields of the Client Profile creation page are termed *core data fields.*
Enter all required fields. If one field is left blank and you try and save after filling in the Release of Information, an alert highlighted in red will appear:





Quality of… SSN/Name/DOB
Have a drop down side bar with options of:

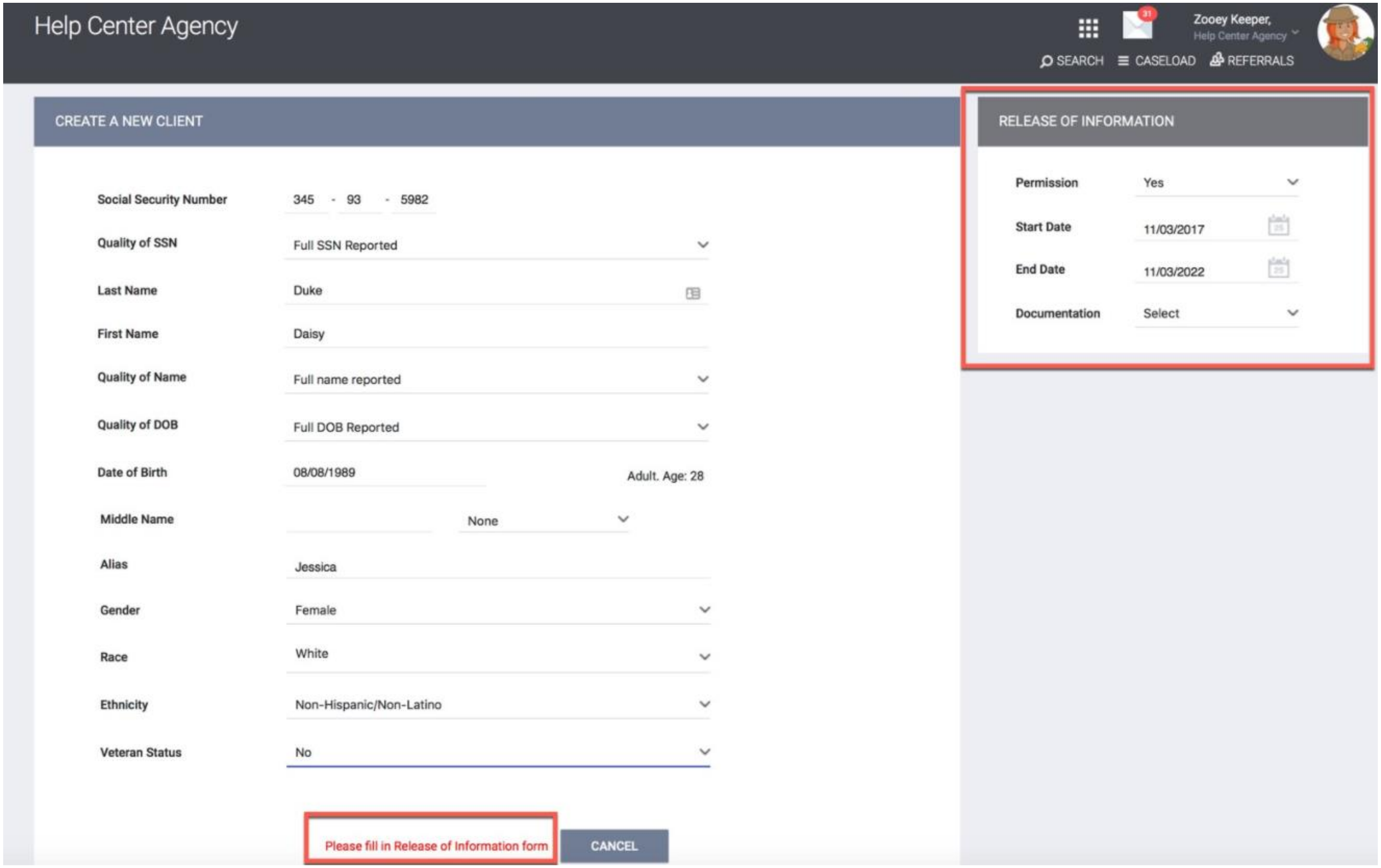
-Full (SSN, Name, or DOB) Reported
-Approximate or Partial Reported
-Client Doesn't Know
-Client Refused
-Data Not Collected

Alias: This field allows you to enter a list of names a client goes by. Clients may have aliases, or past names. (i.e., maiden names, nicknames, etc.) This allows other staff member and/or agencies search for the client's record using any of the names or previous IDs entered into the *Alias* field.

Veteran Status: If the client is 18 and over, the *Veteran Status* field will appear.

Creating New Client Profile- Release of Information

After entering all required fields, *Release of Information* located on the corner top right must be entered before being able to save the client profile.



Creating New Client Profile- Release of Information

Permission

- Yes - Client provided consent
- No - Client did not provide consent

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

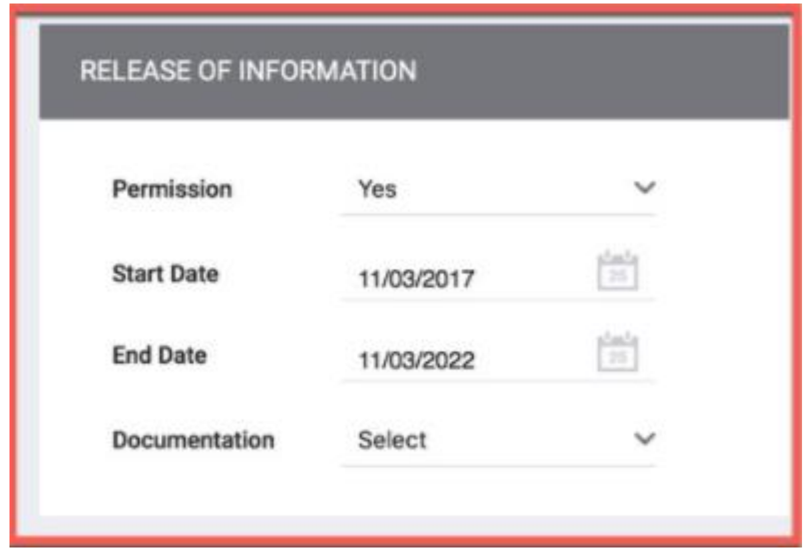
This is the date that the ROI will expire. It will default to the expiration date configured by the HMIS System Administrator.

Documentation

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

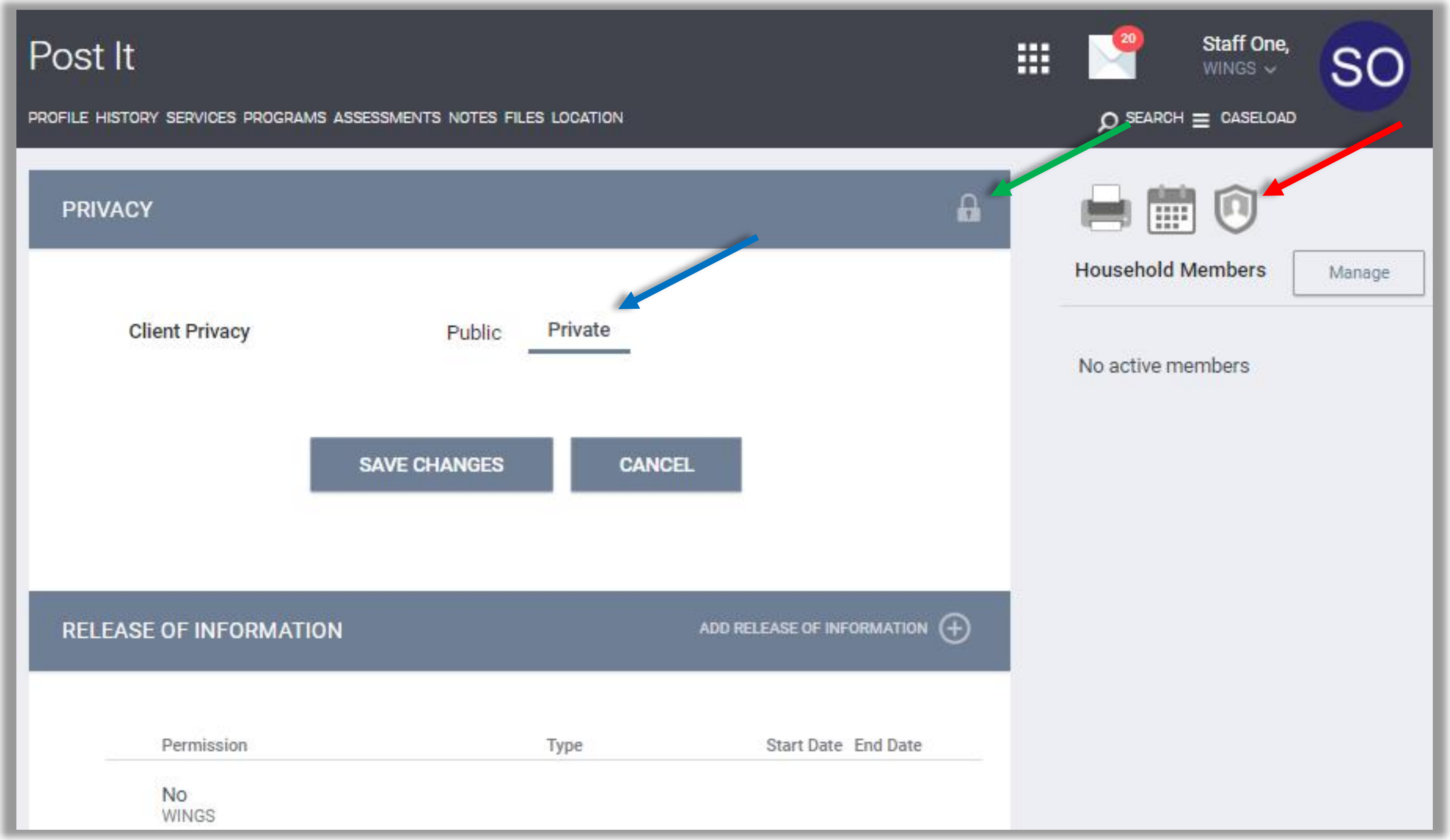
- Electronic Signature - If Electronic Signature is selected, a black button E-SIGN DOCUMENT will be present. Click on it to complete the electronic signature form. The client can sign the form with their finger/stylus.
- Attached PDF – This will prompt the end user to upload the PDF, which must have the client signature.
- Signed Paper Consent or Outside Agency Verified – Enter your location in the *Location* text box that appears.
- Verbal Consent – Select if consent was verbally given by the client.
- Household or Group Member – Select if the client is a minor and an adult household/group member signed the ROI.
- None – Select if no ROI was obtained.

Select ADD RECORD once all data have been entered.



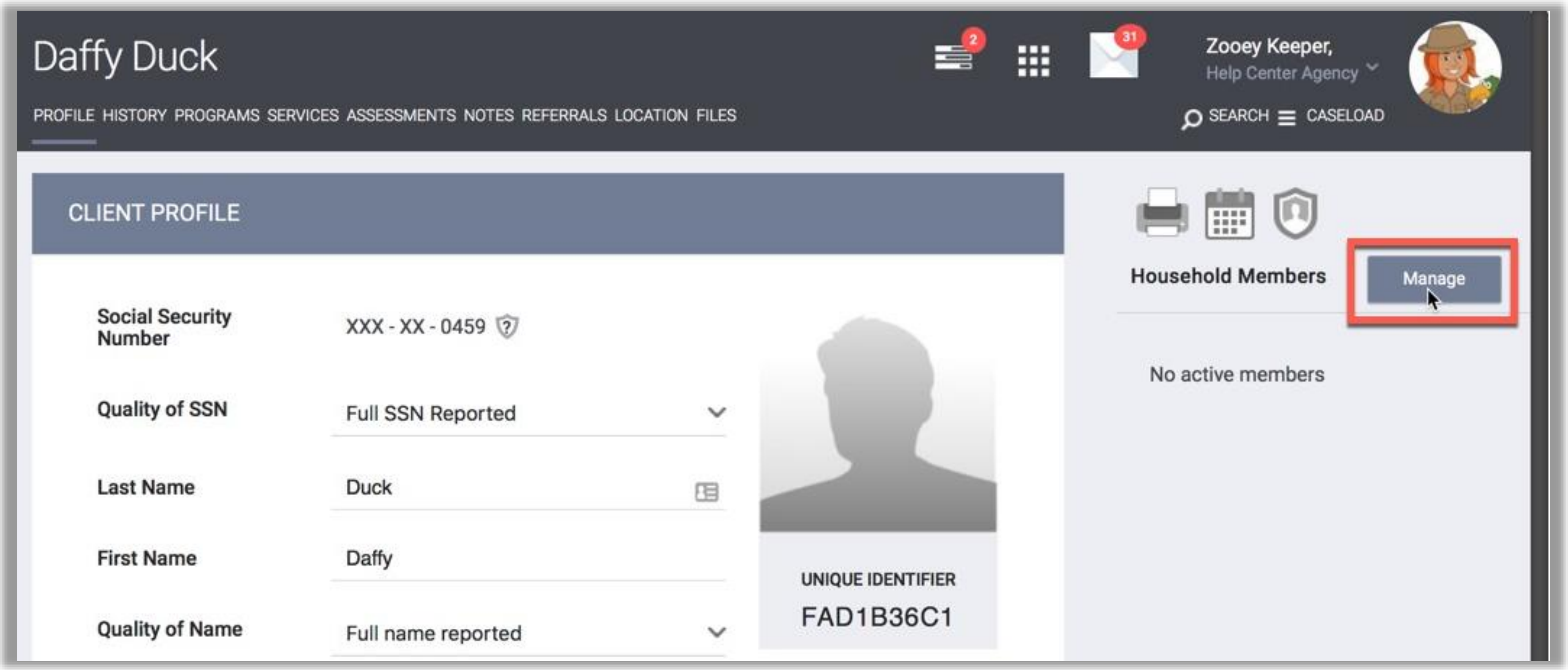
Client Privacy

If the client's Permission is "No" or wishes to remain only within the agency, the user must make the client Private. To do this, go to the client's profile and click on the shield icon (red arrow). Click on **Private** (blue arrow) and click Save Changes. Please note that if the client is set to Private, the client cannot be searched within the System by other Agencies. Clients with a padlock icon (green arrow) are set to Private. Clients who do not wish to share their information will not be able to participate in the Smart Path Program.



Manage Family/Household Members

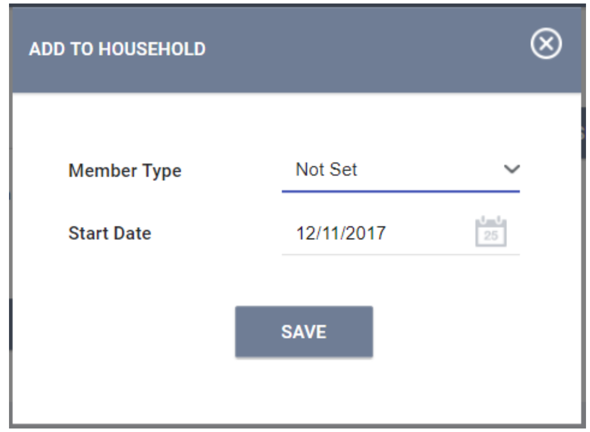
After creating a new client, it is by default that the client will not be a member of Family or Household. To manage Family/Household members, click on *Manage* button on the top right sidebar within the Client profile.

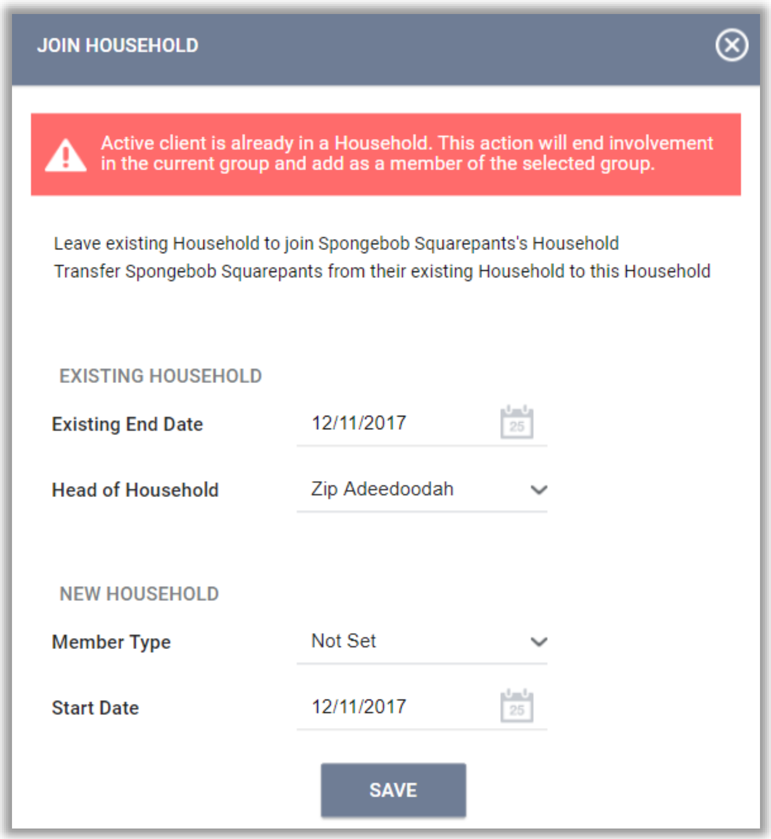


Manage Family/Household Members- Add/Join

On the right side bar, the 10 most recently accessed clients will appear under *Your recent client searches accessed.* (If the client you wish to add as a member of the family is not under your recent search, go to next page.) If the client is indeed a member, hover over the name and an icon of or will appear.

Add option are clients that are not in any members of Family/Household. Clicking on the plus icon will display a window requesting a *Member Type* and *Start Date*. Set the *Member Type* for the client in the dropdown menu and select the *Start Date*, then select Save.





Join option are clients that are already a member of a different household.

If the current client has no active Family/Household members, then the client can join that household by clicking the *Join* button.
Clients cannot be in two distinct households at the same time. If the current client is already a member of a Family/Household, a pop-up will appear with options:

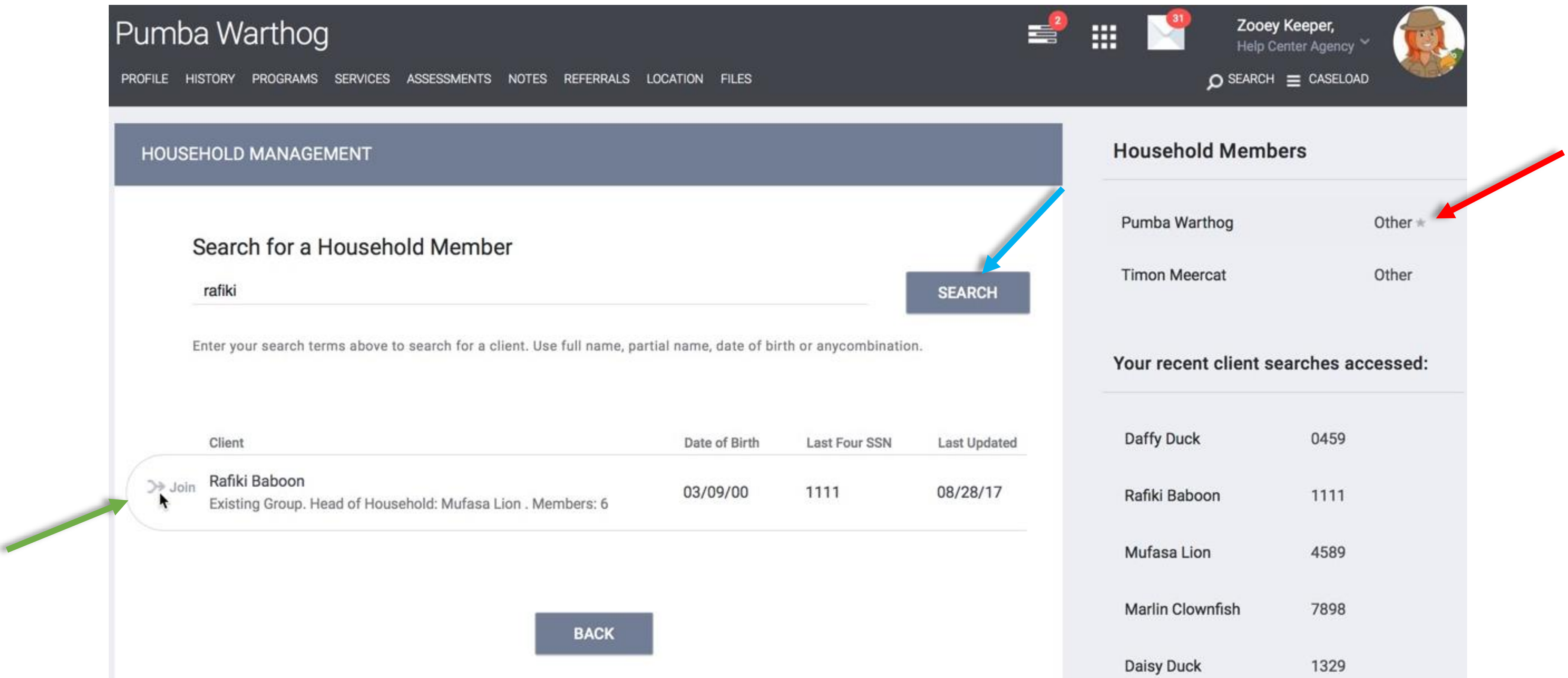
- *Leave existing Household to join another client's Household*
- *Transfer other client from their existing Household to this Household*

Manage Family/Household Members- Household Management

Household Members can also be managed with *Searching for a Household Members* (blue arrow) within the client profile after clicking *Manage* button.

Once the household member is searched, Add or Join functionality will be displayed when hovered over the client's name (green arrow).

Indicates Head of Household in *Household Members* (red arrow).



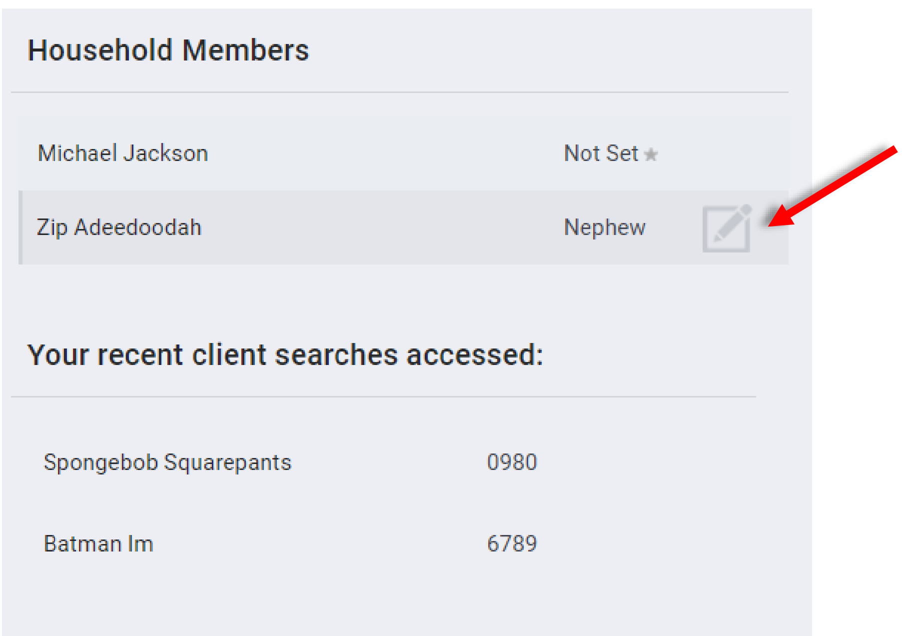
Client's Family/Household Membership-Changing Head of Household or Exiting Household

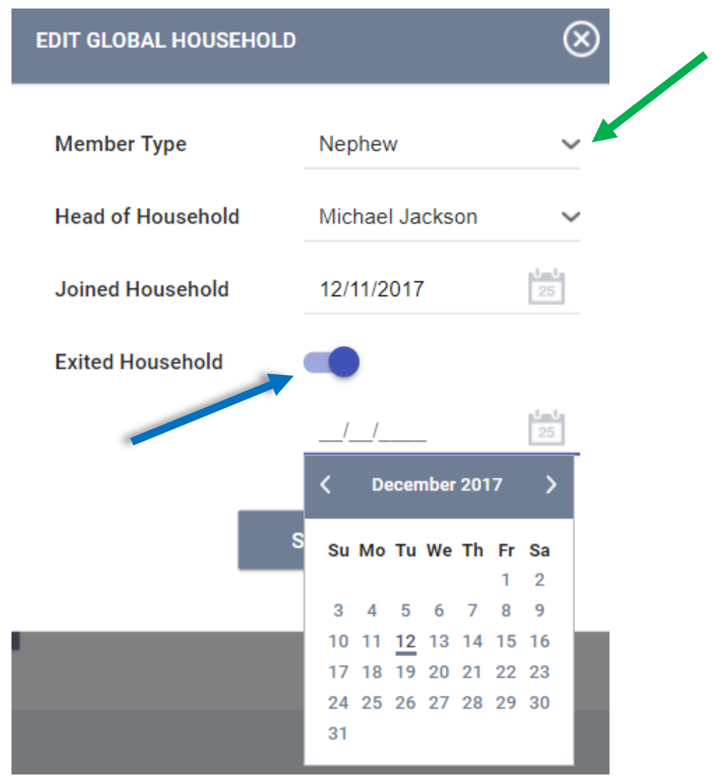
To remove a client from the Household Member Group or edit Head of Household, hover and click the edit symbol (red) next to the client's name.

This will open the *Edit Global Household.* In *Edit Global Household,* you can manage and edit the *Member Type, Head of Household, Joined Household* date, and *Exited Household* tab.

Change the Head of Household: Simply click the drop down icon (green) and select the client's name to be the Head of Household and click save.

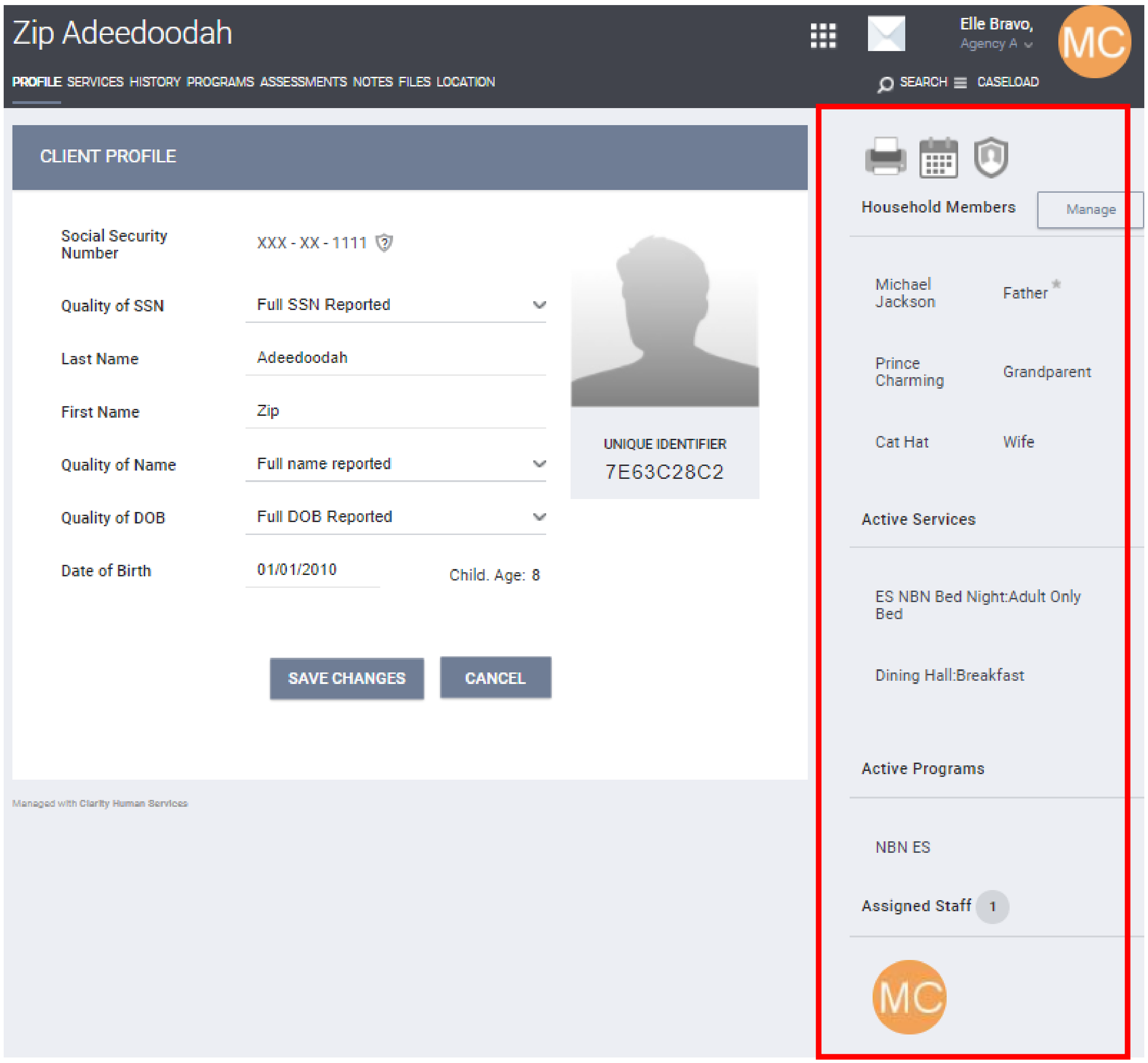
Exit Household: To exit a member of the household, check the *Exited Household* tab (blue) and, in the date field, select the end date to stop the client's participation in the group and click save. The client will be a member in the group and automatically be removed after the chosen date has passed.





Convenient Right Side Bar

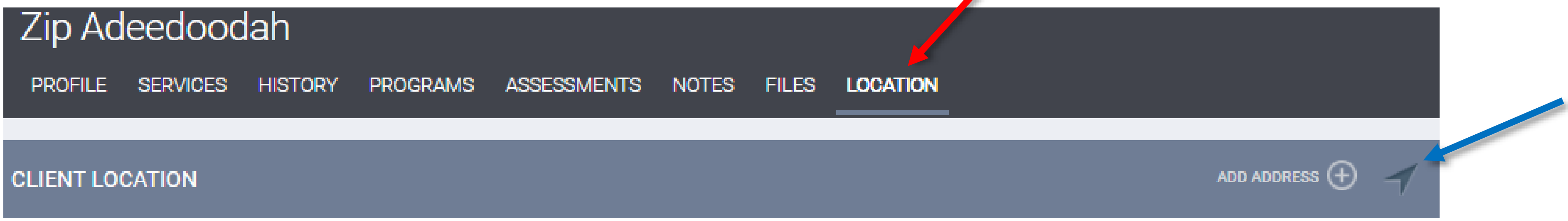
The right sidebar in the client Profile page provides information about Household Members, as well as listing Active Programs, Recent Services, and Assigned Staff. To the right of each entry is an edit icon which will take you directly to the appropriate section of the client record.



Creating and Editing Client Locations- Locate

Manage client's information on the Location tab, including how to create and maintain client address.

To manage client address information, select *Location* tab (red) in the Client Record.



Locate

If your current location is what you want to record, select the locating arrow  (blue) at the top right corner of the screen. This feature will then use Google Maps to determine your location based on your GPS location.

Note: In order for this feature to be successful, Location Services must be turned on for the device you are using to enter client data.

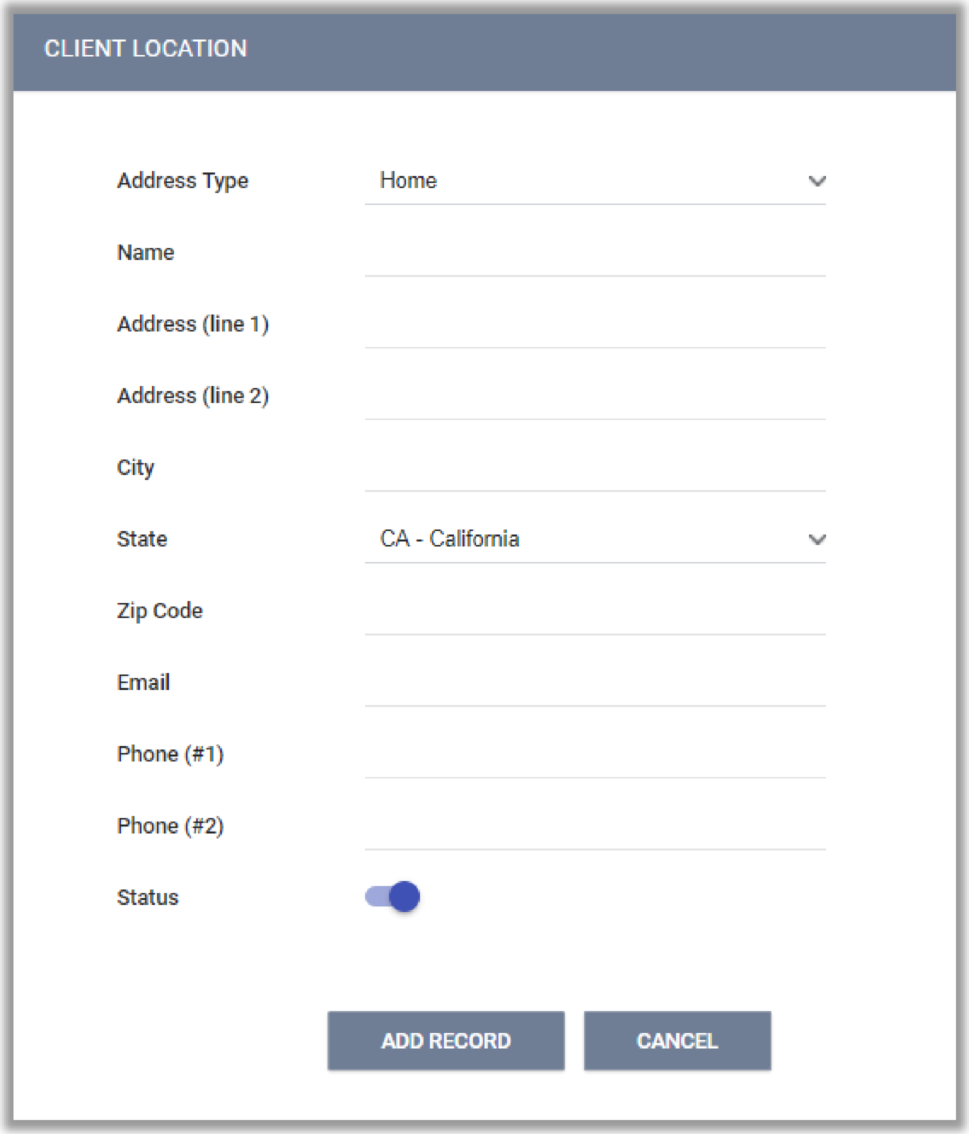
The location is auto-filled in the *Field Interactions* section of the screen. This feature is particularly helpful when you are in the field and need to enter your current location.

For client confidentiality reasons, this section hides the collected location at default. Click the arrow link (green) to expose the data. Locations collected using this method are marked with a yellow location pin.

Creating and Editing Client Locations- Add Address

Add Address

You can also add client's address by clicking the ADD ADDRESS link in the top right corner of the *Location* tab. This will open the *Client Location* screen, where you can enter the address information.



Note: When the Status box is checked, it is considered an Active address, otherwise it is Inactive

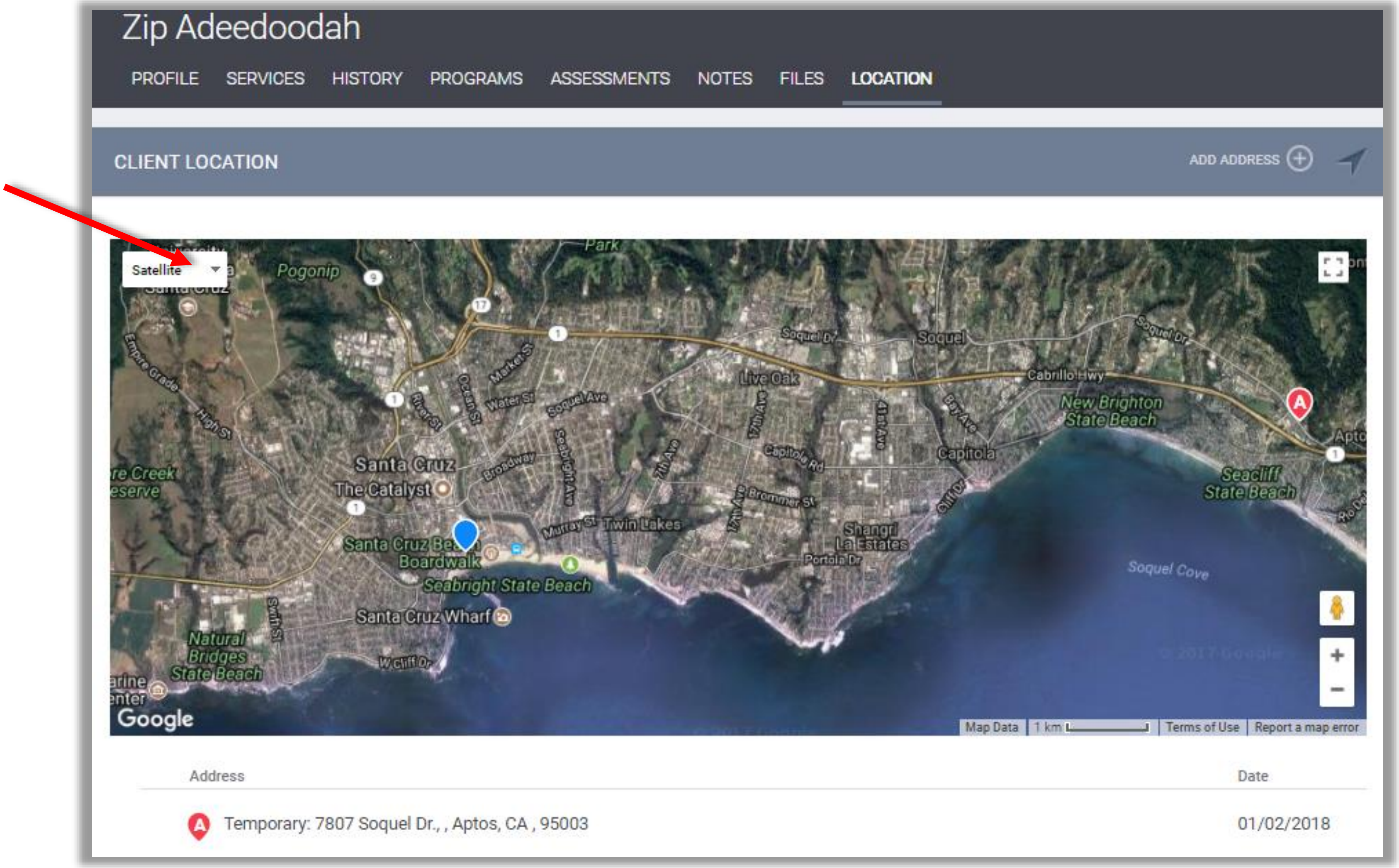
Client Location Distance to Agency

Once an address is uploaded with a valid zip code, the Location tab will show all active addresses plotted on the Map.


Blue pin on map indicated the agency's location. Hover on top of the pin and the Agency's address will be displayed.


Red pin on map indicates the client's location.

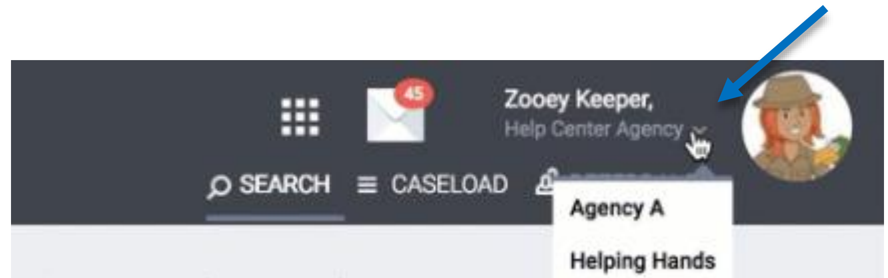
View of the map can also be changed with the drop down arrow- from *Satellite* to *Map* on the corner top left of the map (red arrow).



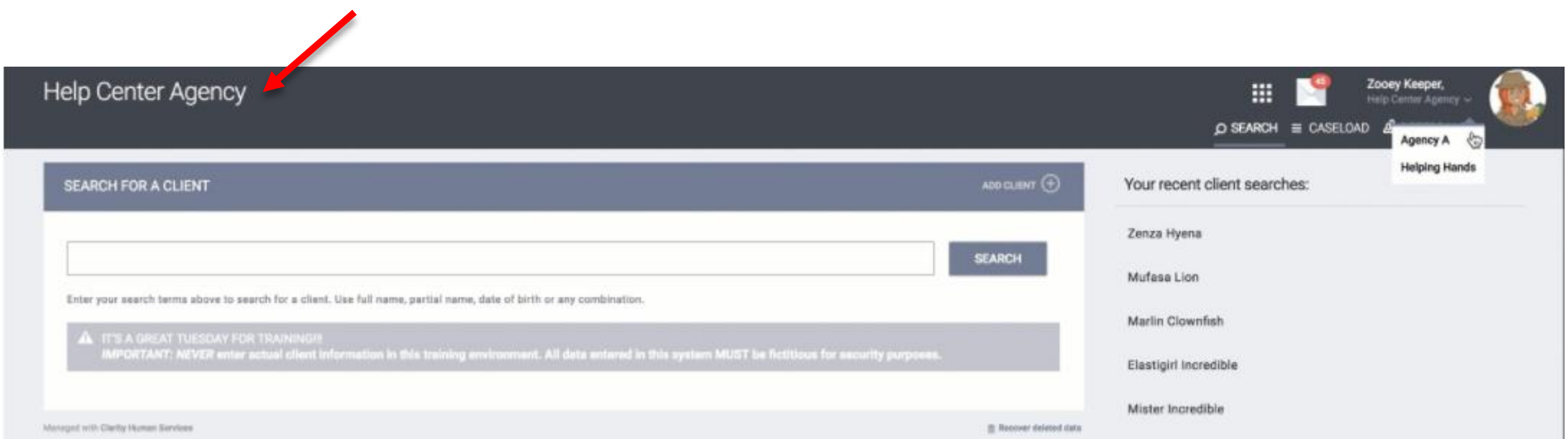
Switching Agencies

To ensure data accuracy, select the appropriate agency for records, program enrollment, and/or providing services.

Agency selections are available next to the user name on the upper right corner of the screen (blue).



The agency that the user is currently working on is displayed on the upper left corner of the screen (red) as well as on the drop down menu under the user's name (blue).



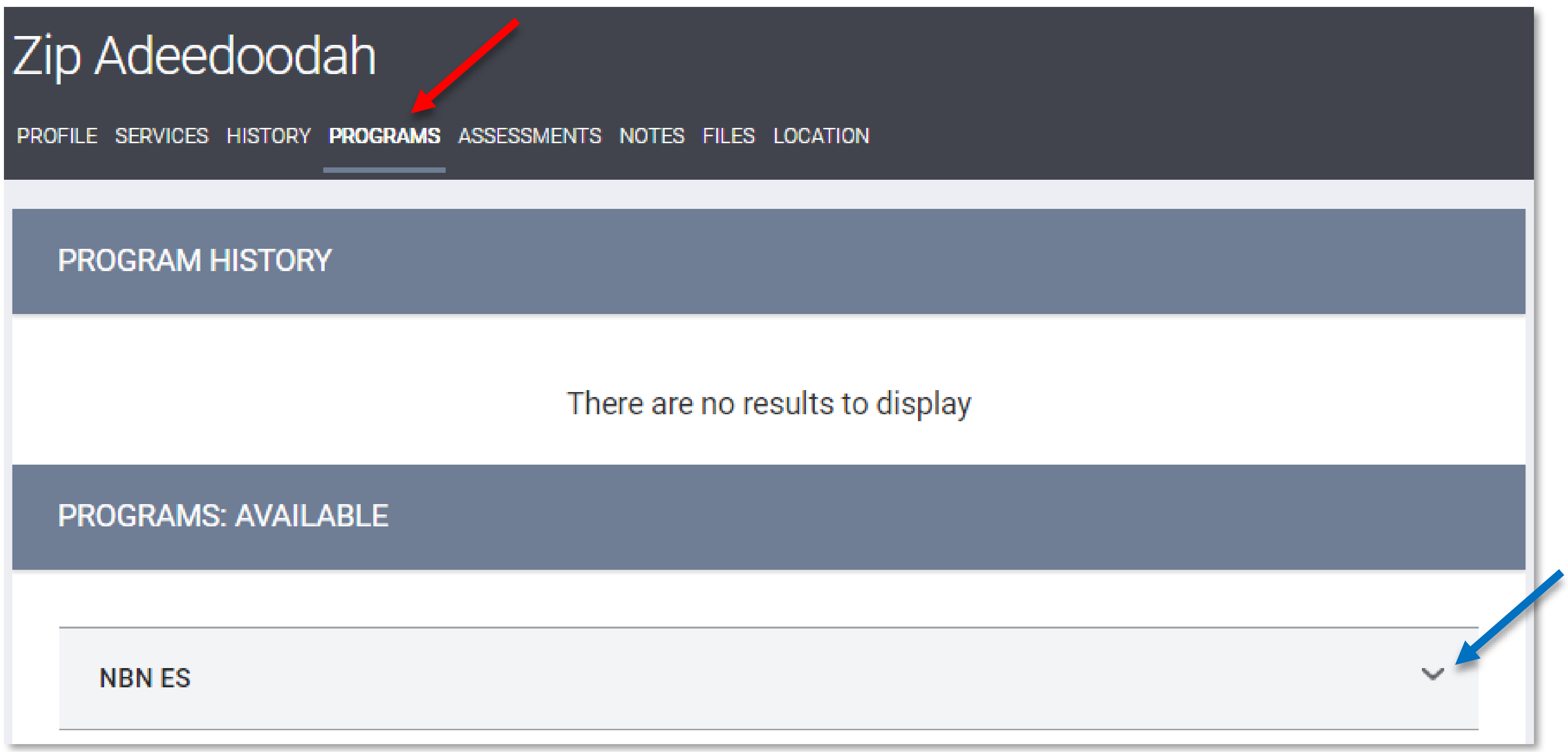
Program Based Transaction

Program-Based services can only be provided once a client is enrolled into a Program. Click on the *Programs* tab- top menu of the client record (red).

Program History- Provides a listing of programs your client is either currently enrolled in, or has been enrolled in the past.

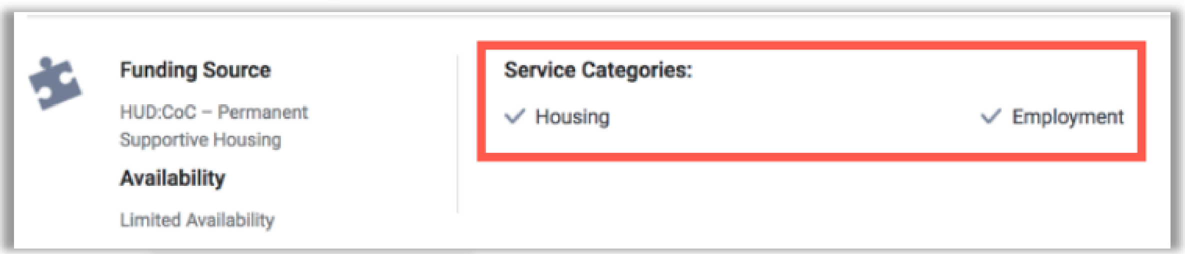
Programs: Available- Lists current programs provided by your agency that are available for client enrollment.

To enroll a client/household into a program, select the drop down arrow (blue) next to the applicable program title under *Programs: Available.*

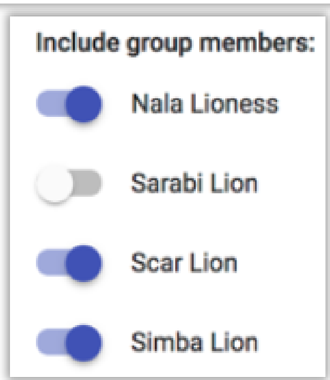


Program Description

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



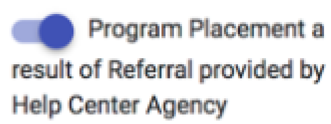
This section indicates the categories of the different services this program provides (e.g. Housing, Employment).



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 Description- Continued

Referral Checkbox
If the program enrollment is conducted as a result of a referral, a checkbox will appear:



Selecting the checkbox will make the system automatically include the referral in the client's Program History. This allows users to easily identify whether a program placement is due to a referral.

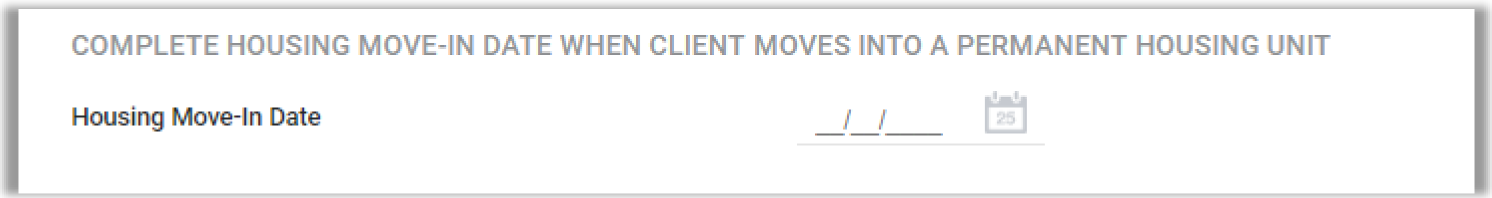
PRINT DIRECTIONS
Selecting *Print Directions* icon allows you to map and print directions from your current location or an alternate location. These directions can be programed for directions by car, foot, bicycle, or bus.

DOC REQUIREMENTS
Selecting *Doc Requirements* allows you to print a checklist of all required documents that the client needs to enter the program.

Program Enrollment

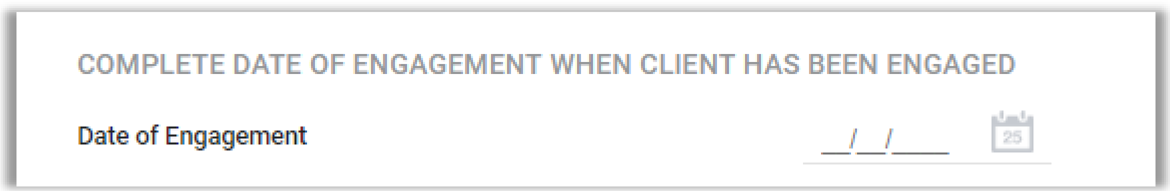
After clicking *Enroll* icon, you will be taken to the Program Enrollment page for your original client. This page will present program specific data element necessary to complete the program enrollment.

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.



If your client(s) are being admitted into a Permanent Housing project, please record the date a client or household moves into a permanent housing unit.

For RRH projects only, a Housing Move-in Date must be entered regardless of whether or not the RRH project is providing the rental assistance for the unit. For example, if an RRH project provides supportive services, but is not providing the rental assistance for the unit, a Housing Move-in Date must still be entered to differentiate RRH clients in housing from those still experiencing homelessness.



Night-by-night or Street Outreach Project:
Please record the date a client became engaged by a street outreach project or night-by-night emergency shelter. This date may be on or after the *Project Start Date* and if the client becomes engaged, must be on or prior to the *Project Exit Date*.

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.

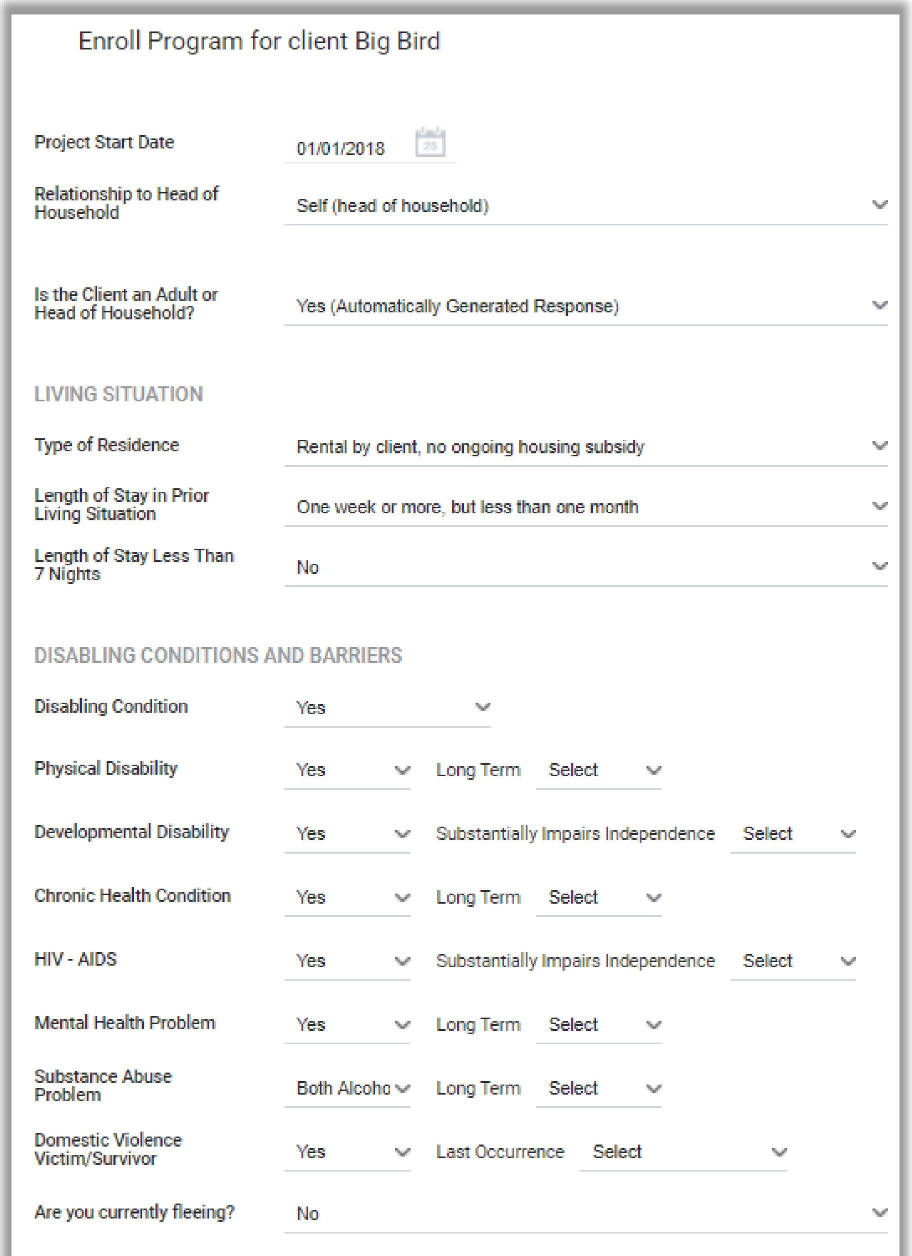
Required
The data element must be completed; this will not allow you to save the page unless a value is set. A red banner is set across the top of the page, and the data element is outlined in red.

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)
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response)

LIVING SITUATION

Type of Residence	Rental by client, no ongoing housing subsidy
Length of Stay in Prior Living Situation	One week or more, but less than one month
Length of Stay Less Than 7 Nights	No

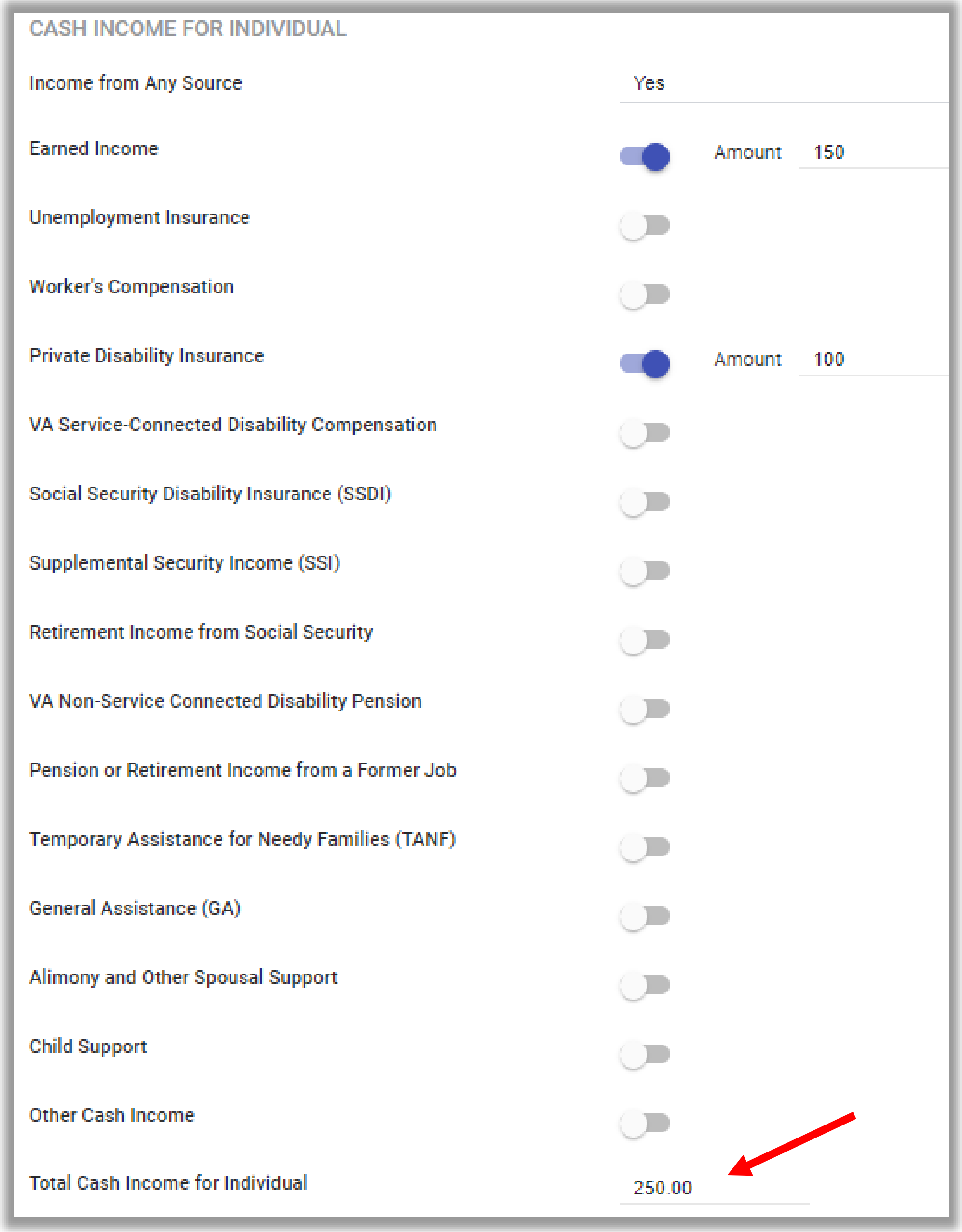
DISABLING CONDITIONS AND BARRIERS

Disabling Condition	Yes		
Physical Disability	Yes	Long Term	Select
Developmental Disability	Yes	Substantially Impairs Independence	Select
Chronic Health Condition	Yes	Long Term	Select
HIV - AIDS	Yes	Substantially Impairs Independence	Select
Mental Health Problem	Yes	Long Term	Select
Substance Abuse Problem	Both Alcoho	Long Term	Select
Domestic Violence Victim/Survivor	Yes	Last Occurrence	Select
Are you currently fleeing?	No		

*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



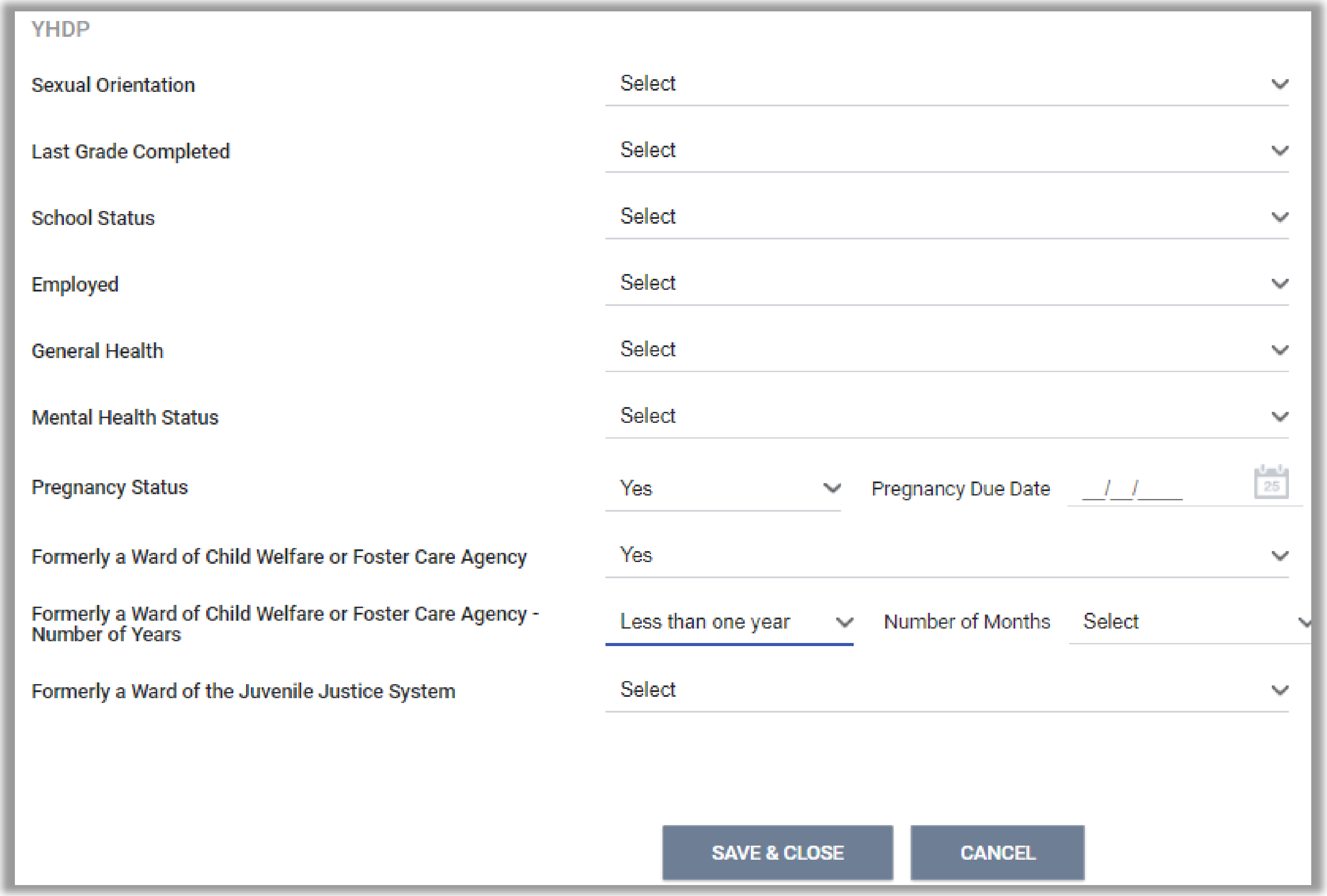
If *Income from Any Source* is selected *Yes*, this will prompt other cash income.

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.

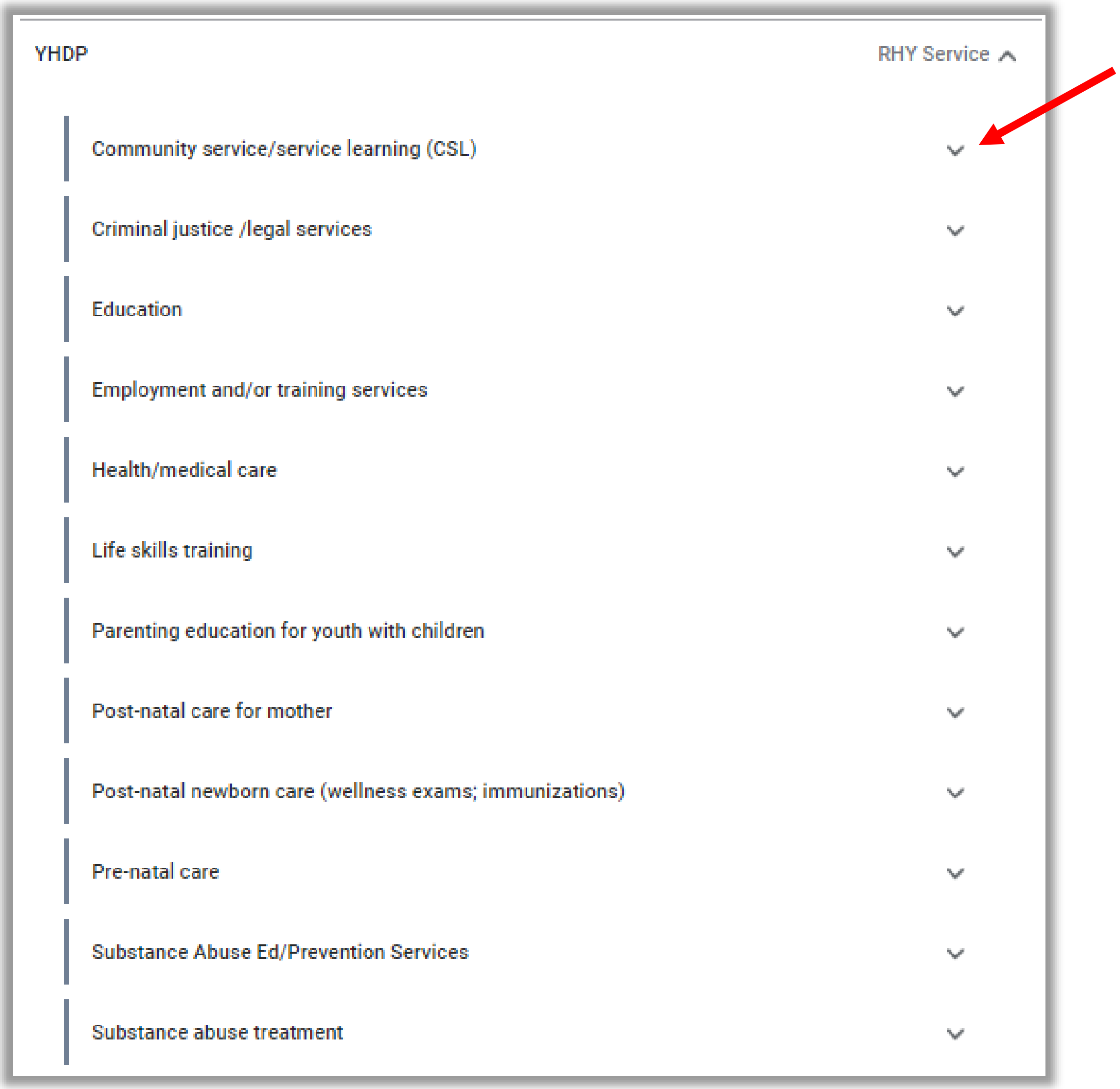
YHDP Questions

YHDP Participants will need to answer these questions. Some questions will be conditional and will prompt additional questions.



Program- YHDP Services

After enrolling the client into the program, it automatically directs you to *Provide Services.* Click on the down arrow (red arrow) to expand and enter the start/end date and any service notes for the client.
YHDP Services:
(See next page for service description)



Program- Services Description

1. **Community service/service learning (CSL)**: Activities that involve youth in helping others or the community.

2. **Criminal justice/legal services**: Legal services or guidance provided through an attorney or an attorney-supervised paralegal.

3. **Education**: Includes learning disability assessment, tutoring, GED preparation, local school enrollment, vocational education, etc.

4. **Employment and training services**: Includes services related to helping young people obtain and retain employment, such as assessment, coaching, filling out applications, interviewing, practicing and conducting job searches, referrals, and job maintenance skills.

5. **Health/medical care**: Provision of general health care or surgical services by licensed medical practitioners.

6. **Life skills training**: Includes formal and informal coaching and training in communications skills, health promotion, conflict/anger management, assertiveness, goal setting, budgeting, life planning, nutrition, hygiene, etc.

7. **Parenting education for youth with children**: Services designed to build improved parenting skills for RHY clients with children.

8. **Post-natal newborn care**: Services and healthcare provided to the baby after birth, including wellness exams and immunizations.

9. **Pre-natal care**: Services and healthcare provided to expectant clients to ensure a healthy pregnancy, labor, and delivery.

10. **Substance Abuse Treatment**: Any research-based youth treatment service aimed at stopping substance use disorders and related problems.

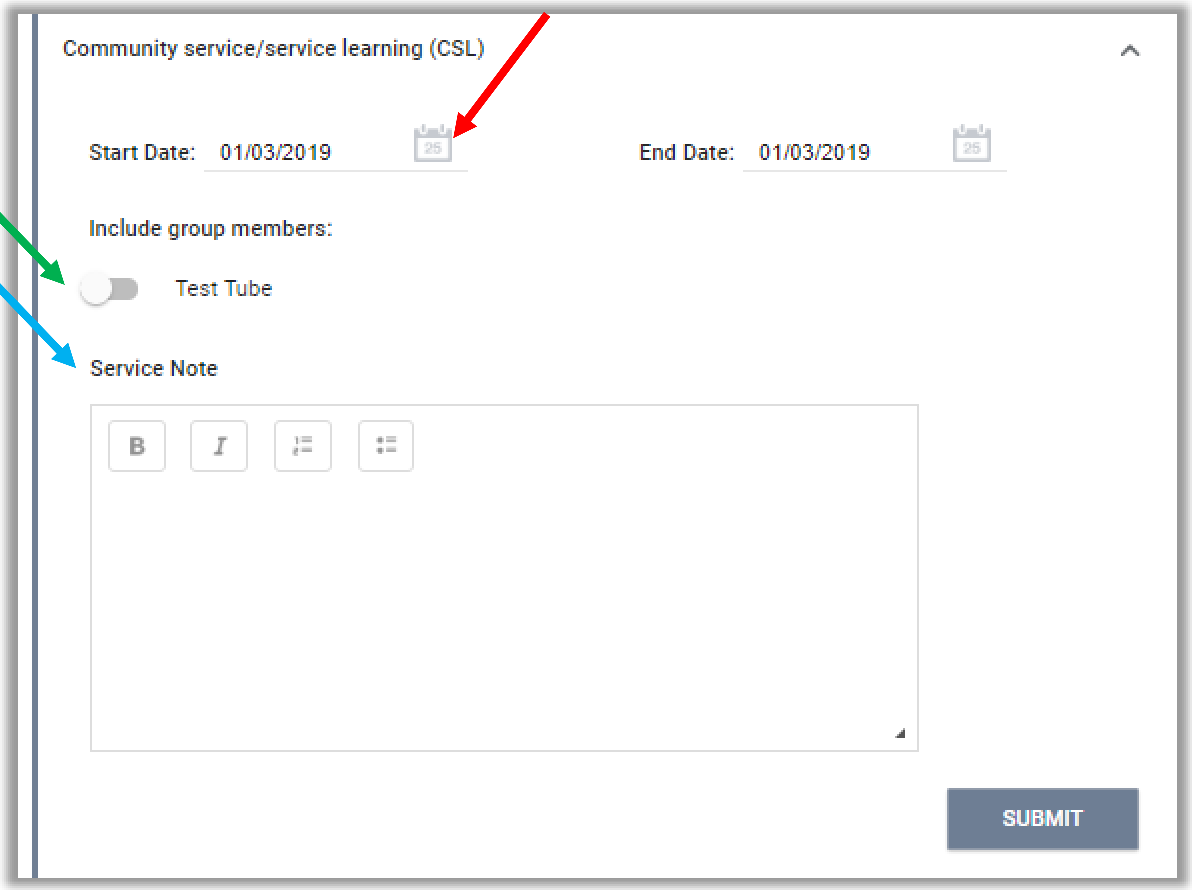
11. **Substance Abuse Ed/Prevention Services**: Comprehensive assessment of an individual’s current or past involvement with alcohol and/or drugs and/or provision of treatment, including screening, aimed at stopping their substance abuse.

Program- Record Services

Record the date of the initial service connection in the date field (red)and indicate the type of service. Services which require repeat visits for the same kind of service (e.g. community service/learning, pre-natal care, etc.) are only required to enter the first service of the type (i.e. not one entry for each pre-natal care visit).

Service note (blue)- An optional tool to make notes about the service given.

Include group members (green)- Some services are configured so that other members of the family also receives the Service Transaction. Click on the toggle tab, the selected member will automatically receive the service transaction as well.

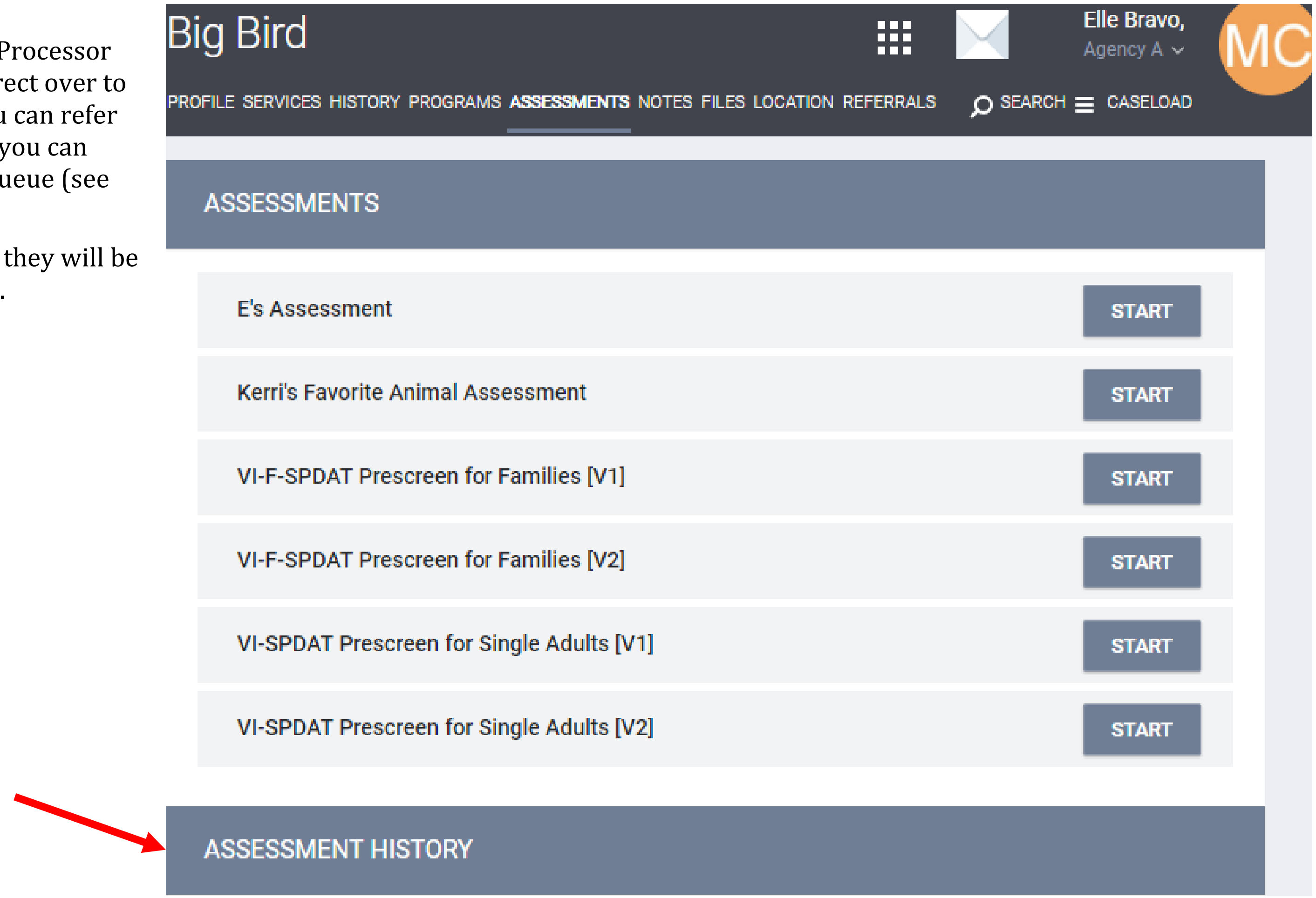


Assessments

Each agency will have list of assessments targeted to measure the unique needs of their client base. Consult with your agency manager to determine which assessment is the most appropriate for your client.

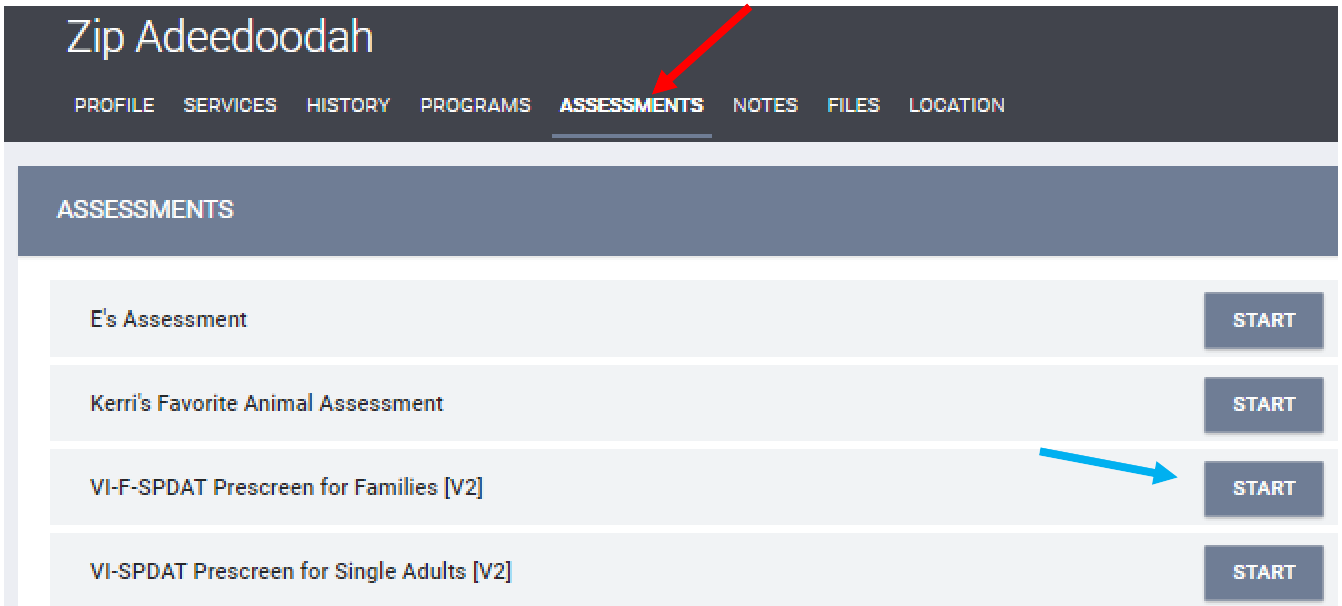
After you save, the Assessment Processor and Eligibility Processor will direct over to the eligibility screens where you can refer directly to eligible programs or you can refer the client to Community Queue (see next page.)

When Assessments are created, they will be in the Assessment History (red).



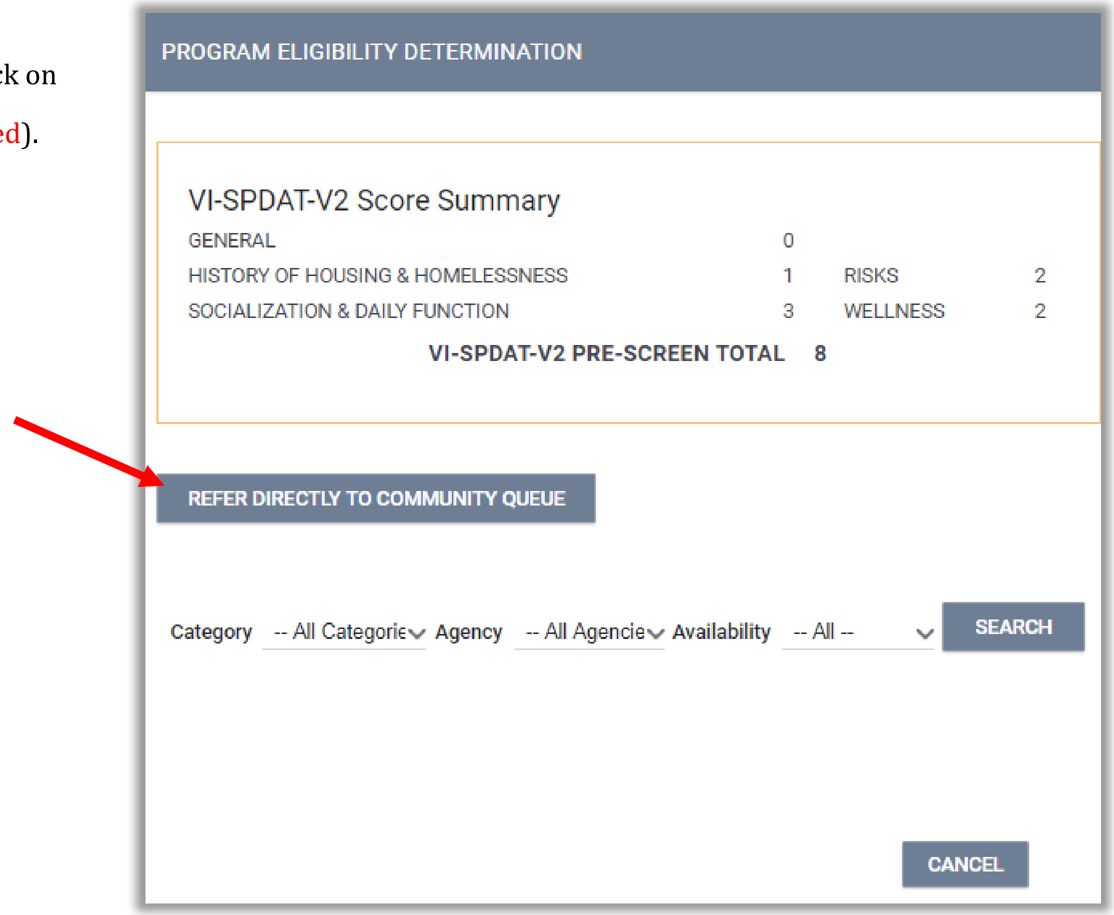
Referring to the Community Queue

To refer a client based on an Assessment score, go to the Assessments tab (red) in the client record and click *Start* next to the appropriate *Assessment* (blue).



Community Queue-Program Eligibility Determination

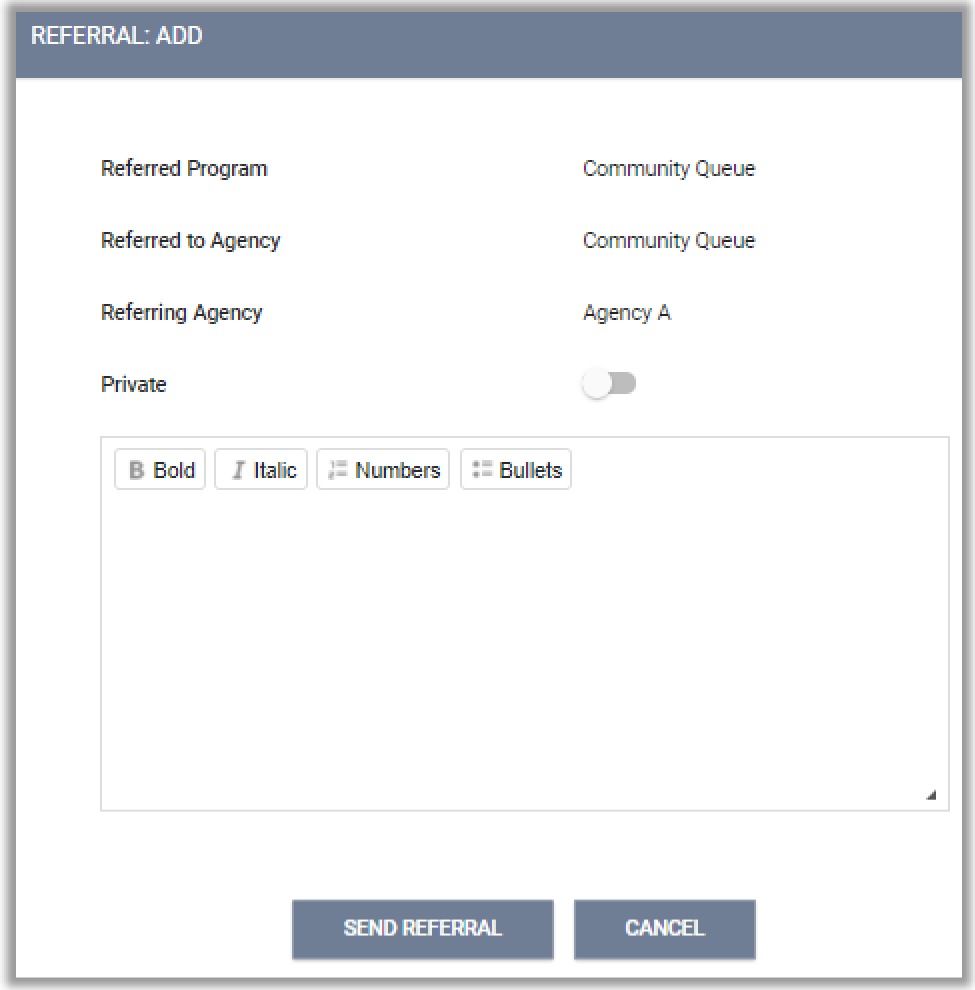
After completing the assessment, click on REFER DIRECTLY TO COMMUNITY QUEUE (red).



Community Queue

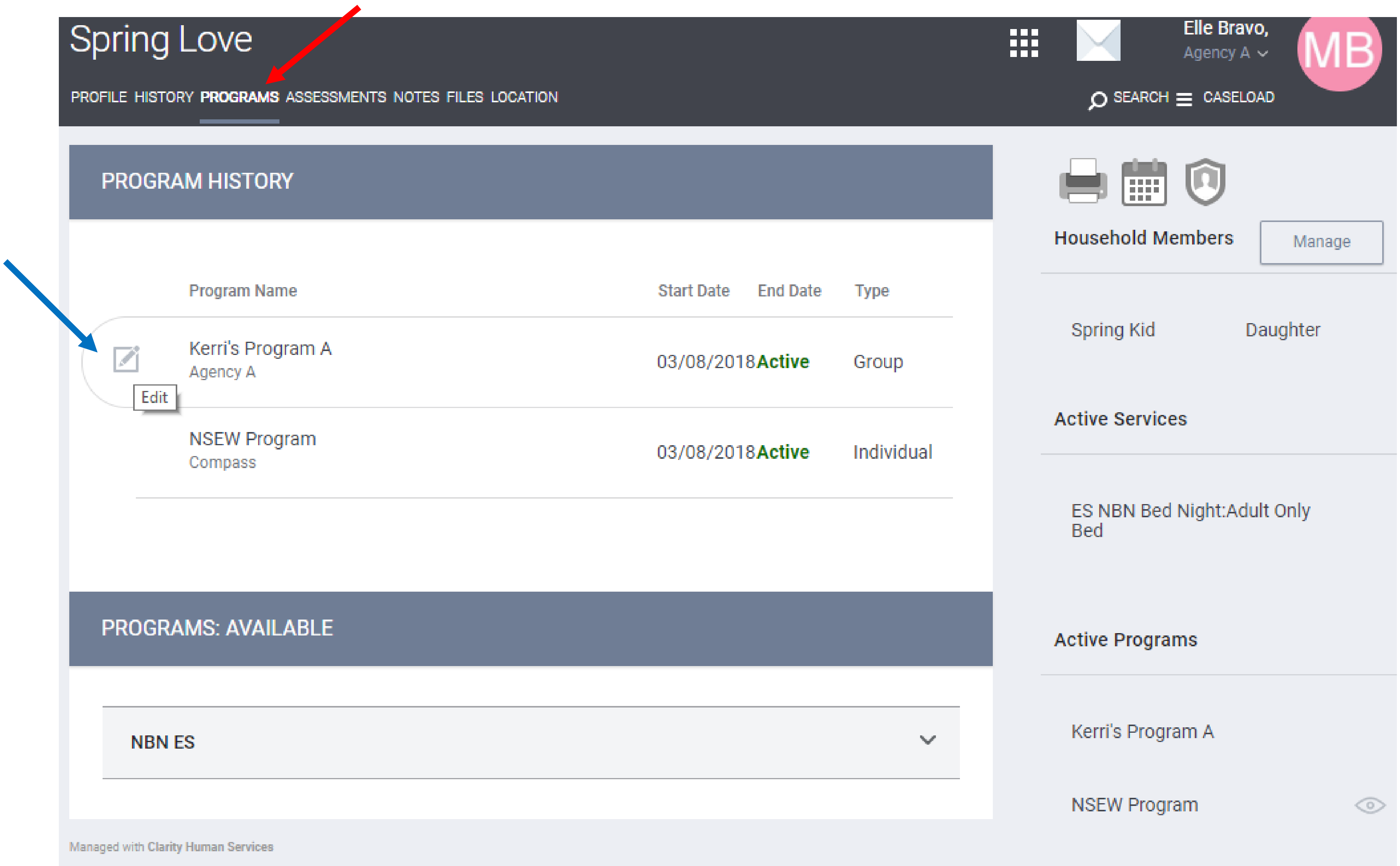
Click *Send Referral.* Now the Referral has been made.

Referred Program	Indicates the program to which you are referring your client.
Referred-To Agency	Indicates the agency that provides the program to which you are referring your client.
Referring Agency	This is the agency from which the referral originated. (This will be your Agency)
Private	Select this if you want the referral to be visible in the History tab of the client's record ONLY for the Referred-To agency.
Message Box	Here you can send a secure message to the Referred-To agency regarding the referral.



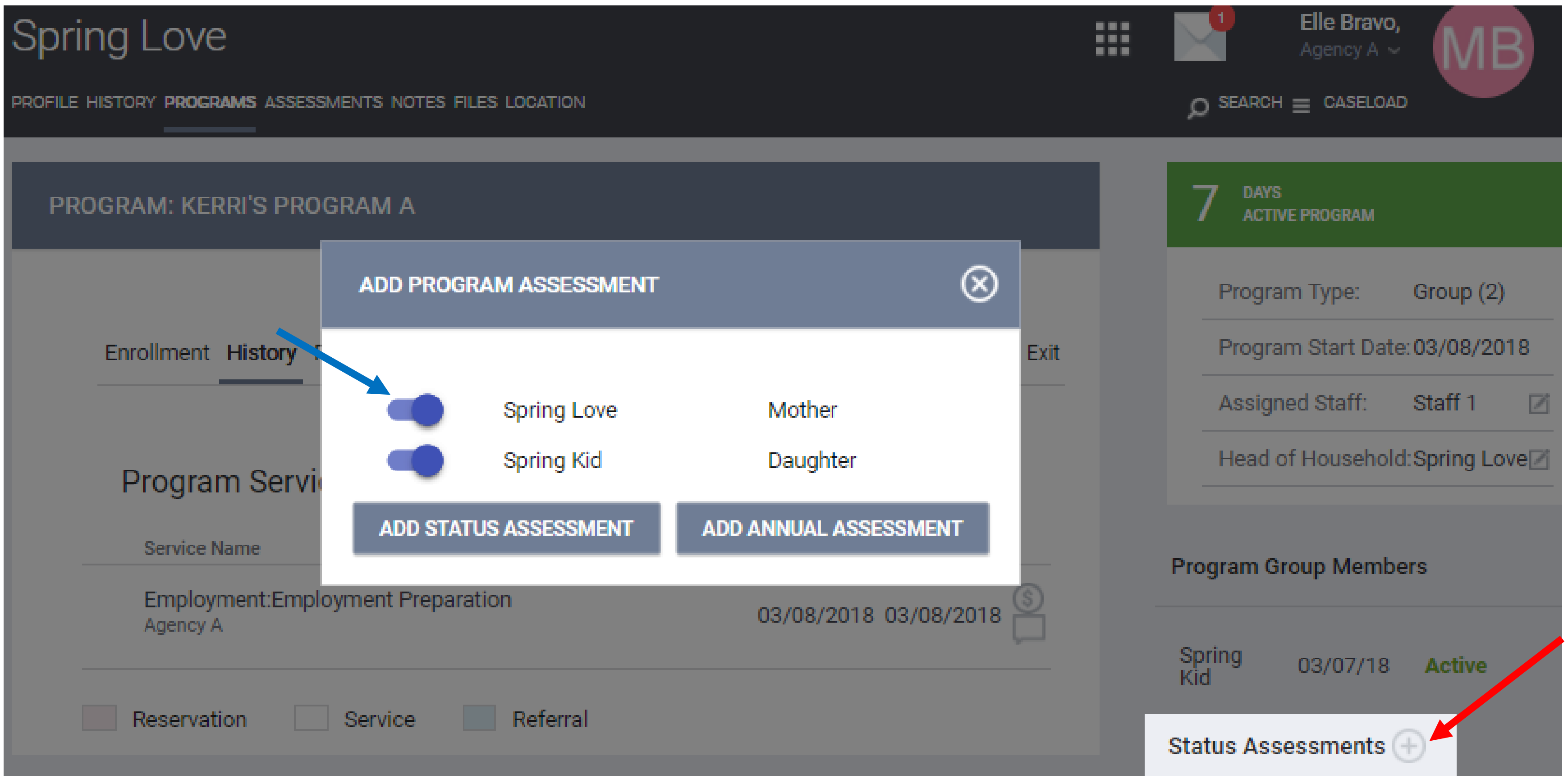
Status Assessment

To conduct a status assessment, go to the *Programs* tab in the client's record (red), then click on the edit icon next to the correct Program (blue).



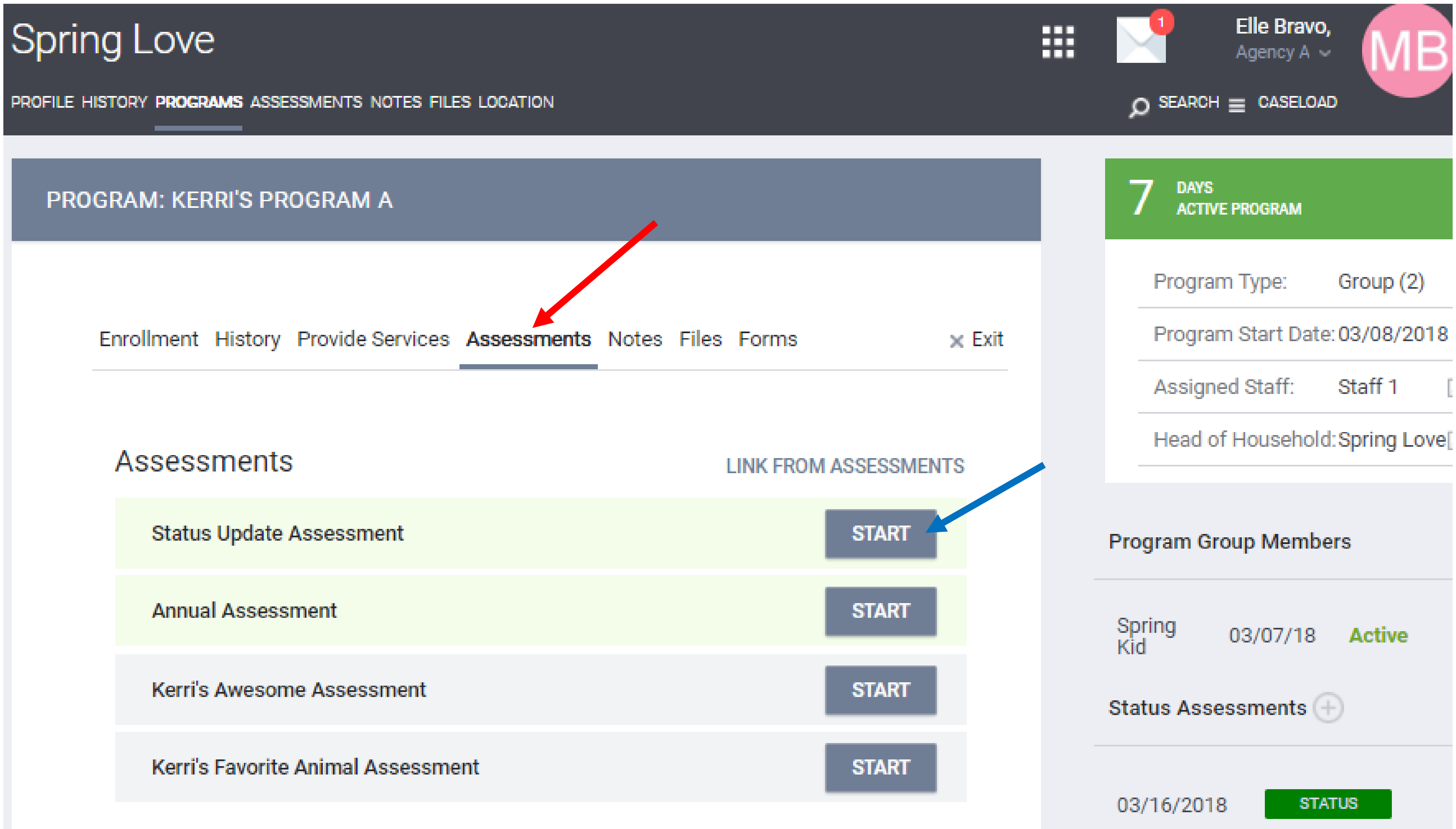
Adding Status Assessment with Group Members

To add a Status Assessment for the client and selected group members, click the  icon (red) on the Status Assessment in the convenient right side bar. Click on the toggle to select members (blue), then click on *Add Status Assessment* or *Add Annual Assessment*. After completing the assessment, click *Save and Next* if conducting group assessment, after each member's assessment is complete click *Save and Close.*



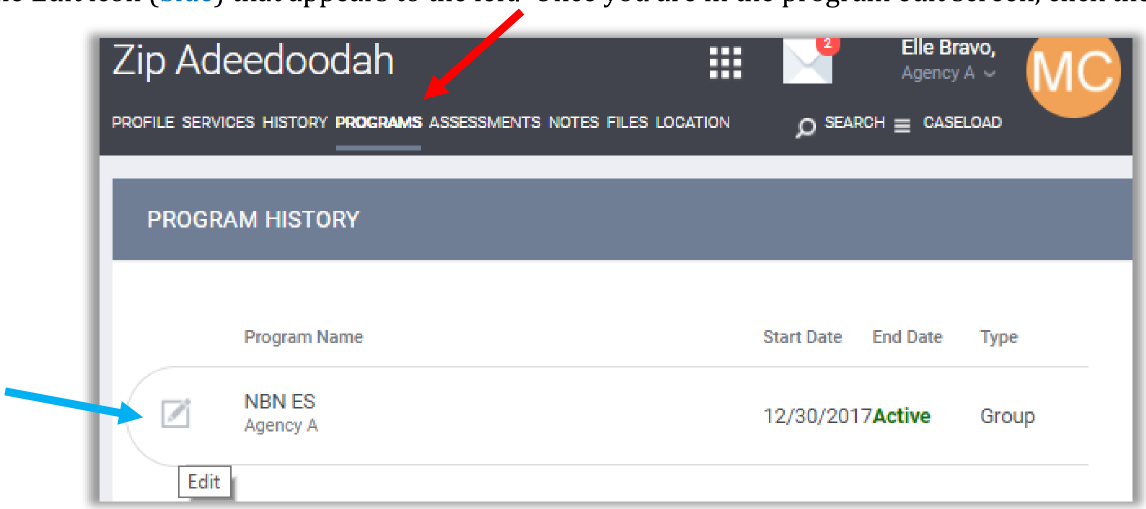
Adding Status Assessment

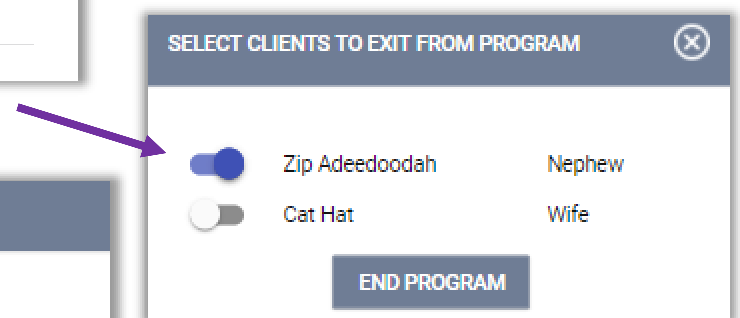
You can also add a Status Assessment from the Program Assessment Tab under *Assessments* (red), then click *START* (blue) next to the desired assessment.

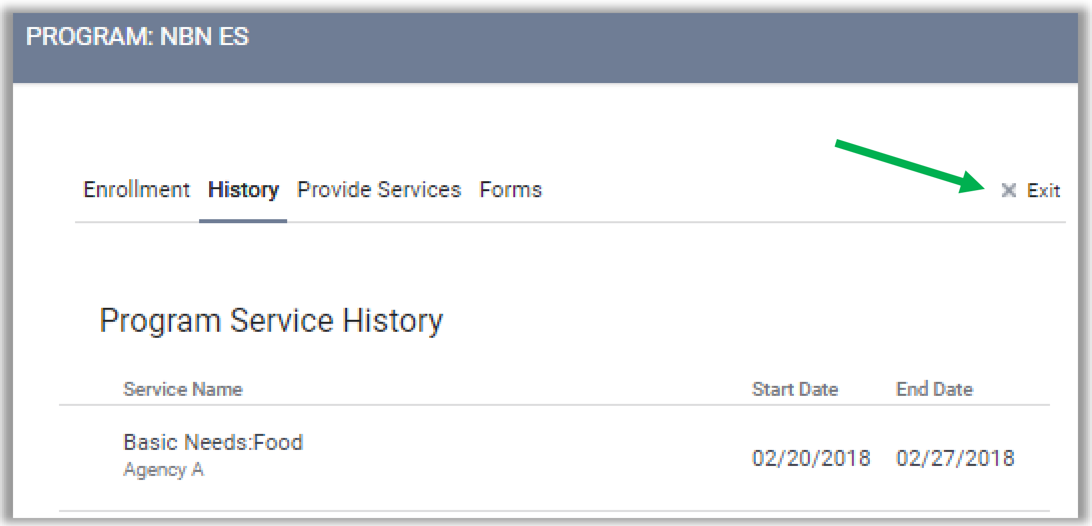


Exiting a Client from a Program

To exit a client from a program, go to the Programs tab (red) from the client's record, mouse over the program name, and select the Edit icon (blue) that appears to the left. Once you are in the program edit screen, click the Exit button to the right (green).



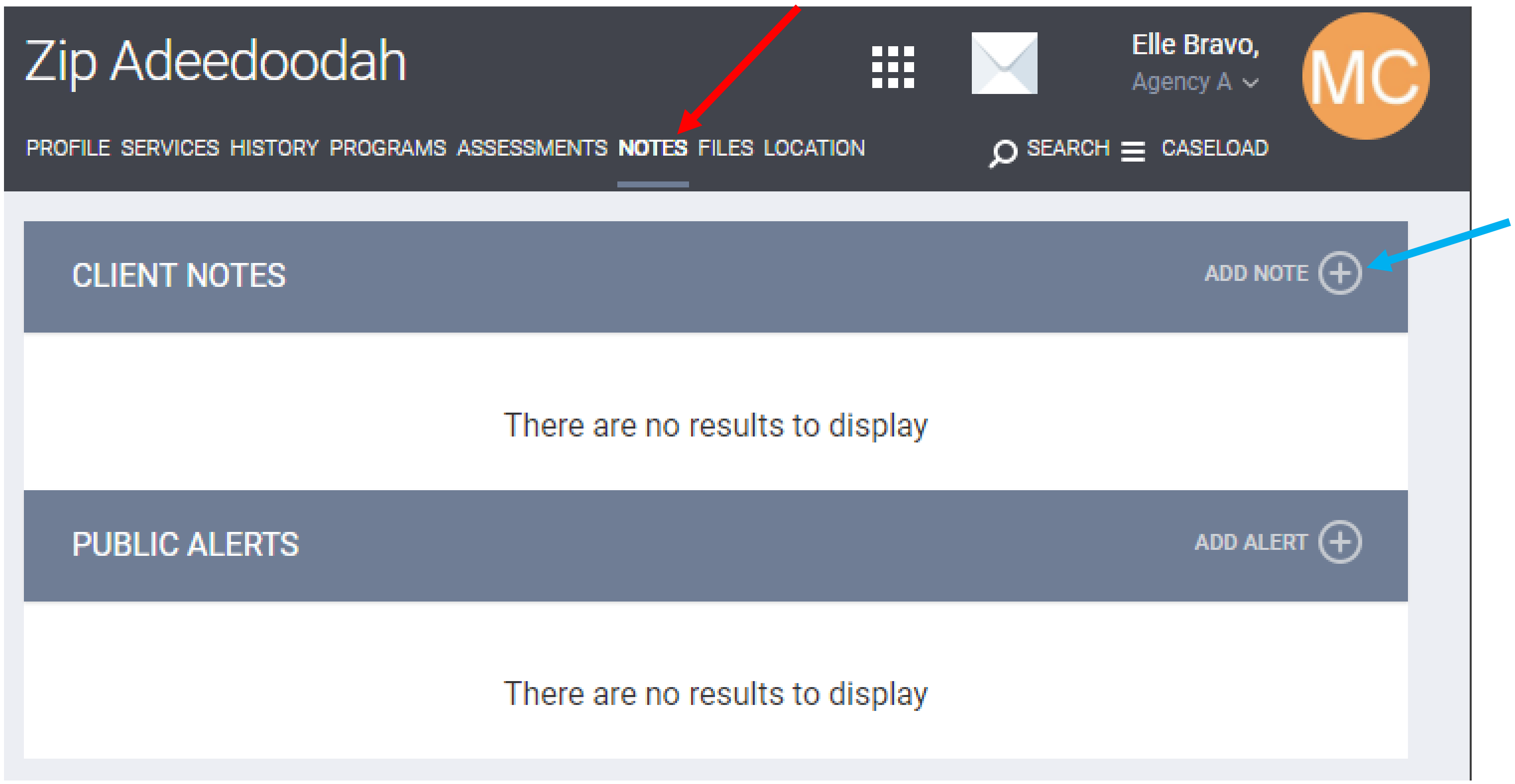




When exiting a household, the option to exit several household members will appear. Simply toggle the switch next to the member(s) you wish to exit (purple), and their exit screens will appear in sequential order for each household member.

Client Notes

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

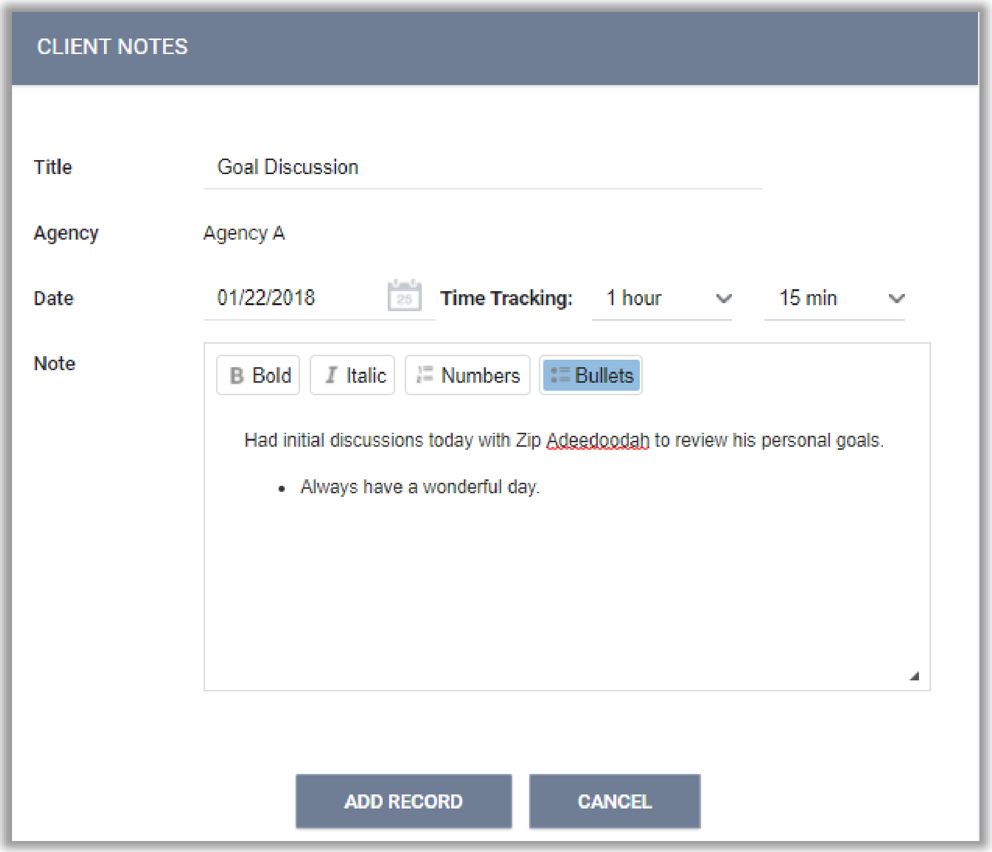


Client Notes- Continued

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

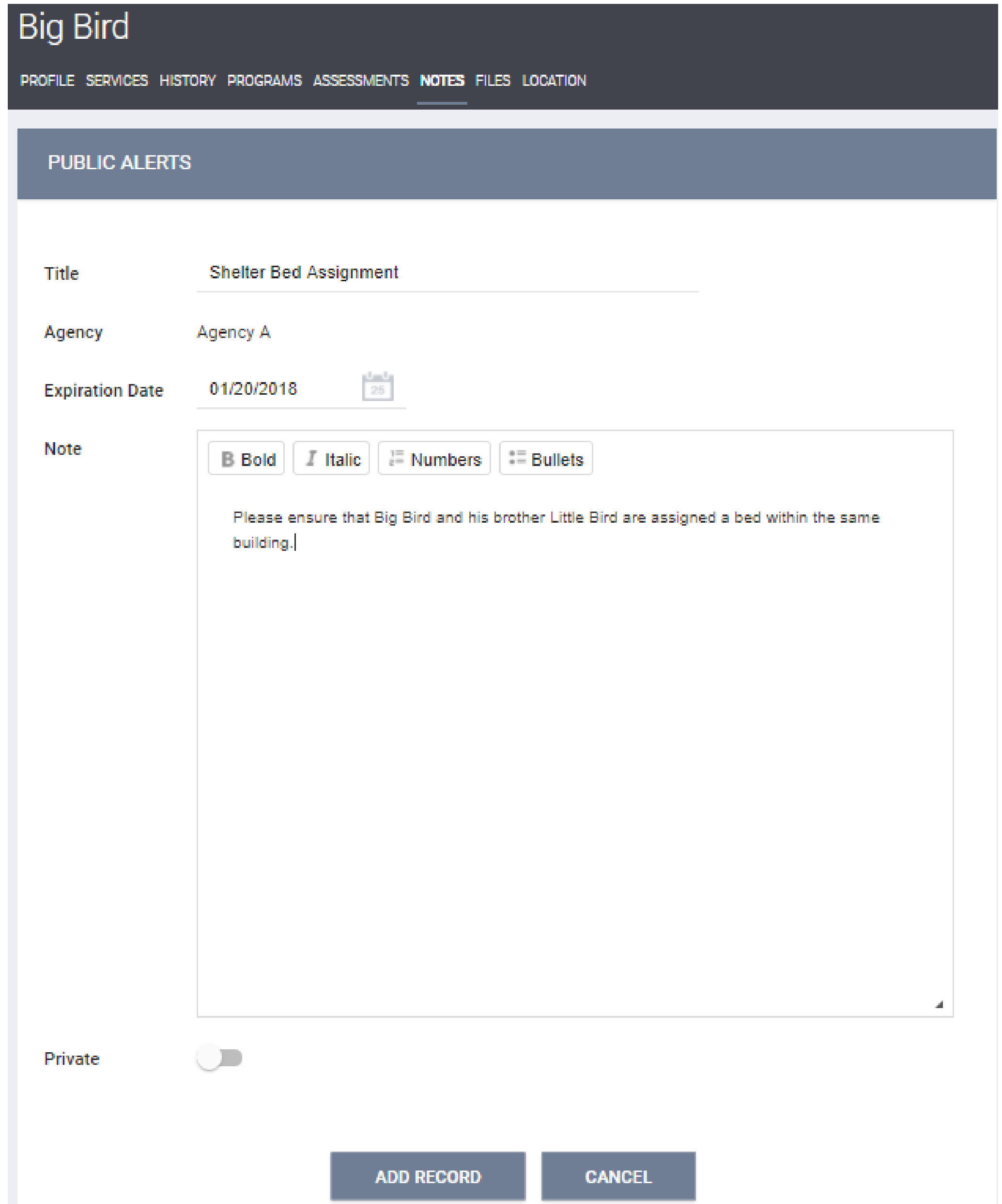
Time Tracking fields are also available allowing the user to track the time spent on creating the client case note. Utilize the drop-down fields in the *Time Tracking* area to record the number of hours and minutes spent.

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



Public Alerts

Public Alerts can be created and appear in the client profile to notify your agency or several agencies of a client situation/need.



Click notes in Client Profile and click on 

Under *Public Alerts,* enter Title, Expiration Date, followed by Note explaining the nature of the alert. (Agency field will be automatically entered.)

Selecting the *Private* checkbox will make the Public Alert visible to only staff members to your agency. Not selecting the it will make it visible to all agencies.

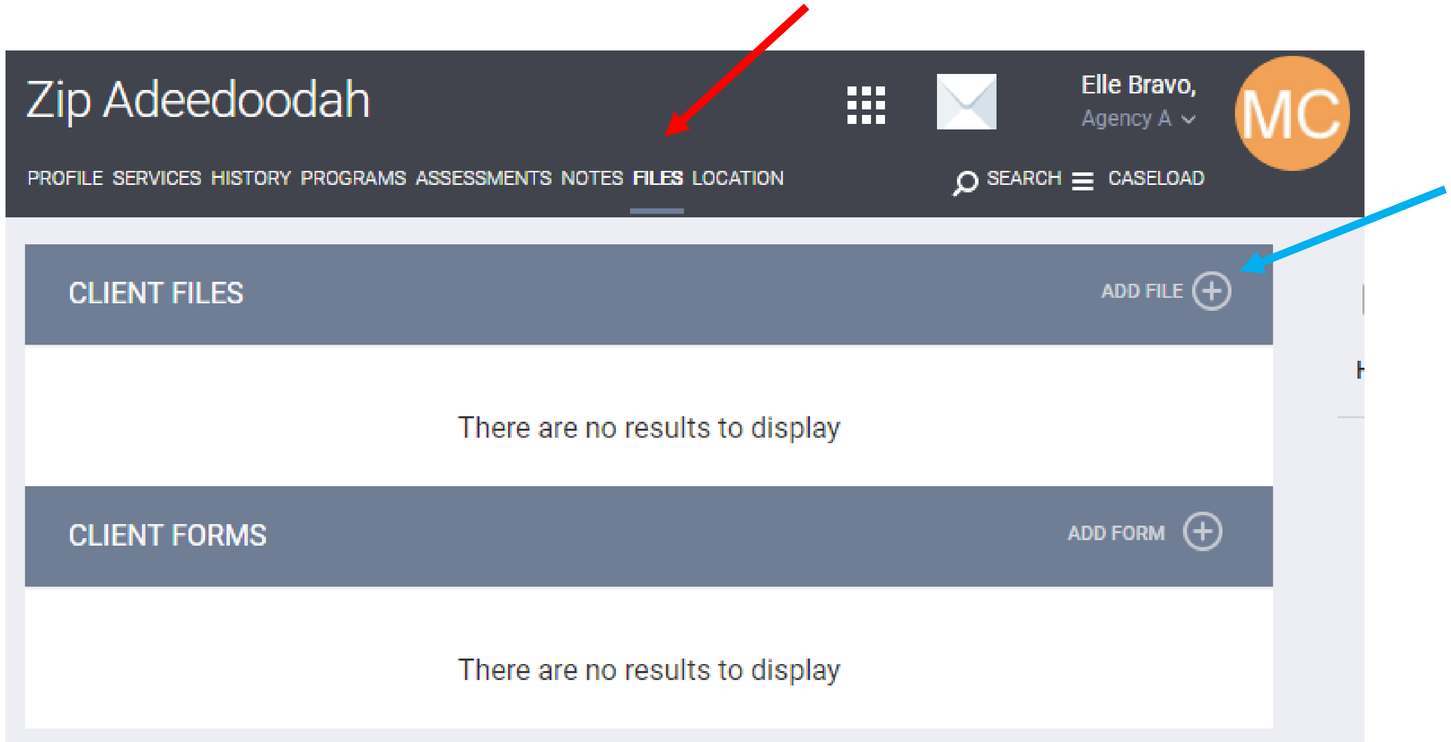
After selecting *Add Record,* you can verify that the Public Alert is visible on the client's Profile page.

Files and Forms

To access client's Files and Forms, on the Client Profile page, click on the *File* tab (red) in the top menu.

Adding a New Client File

To add a new file, select *Add File* link on the top right corner of the File section (blue).



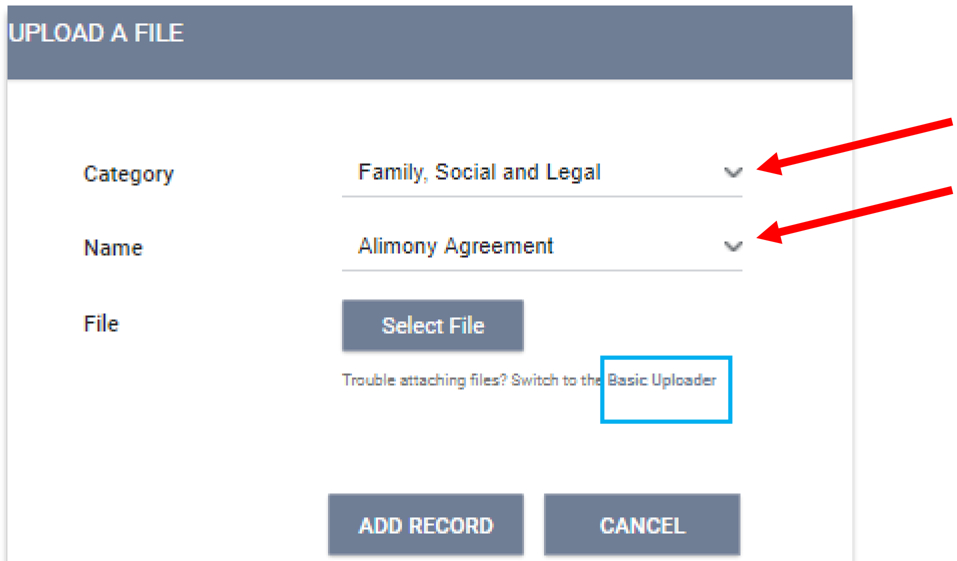
Upload a File

After clicking on the *Add File,* select what *Category* and *Name* that best identify the file you are uploading from the drop down menu (red).

Click on *Select File* to select the file from your personal computer, if the file does not upload, click on *Basic Uploader* (blue).

Once a file is uploaded, it is saved to the File tab by order of the upload date. There is no limit to the number of files that can be uploaded for each client.

** Clarity supports all of the most common file types (Word, Excel, PDF, JPG, PNG, etc.)*

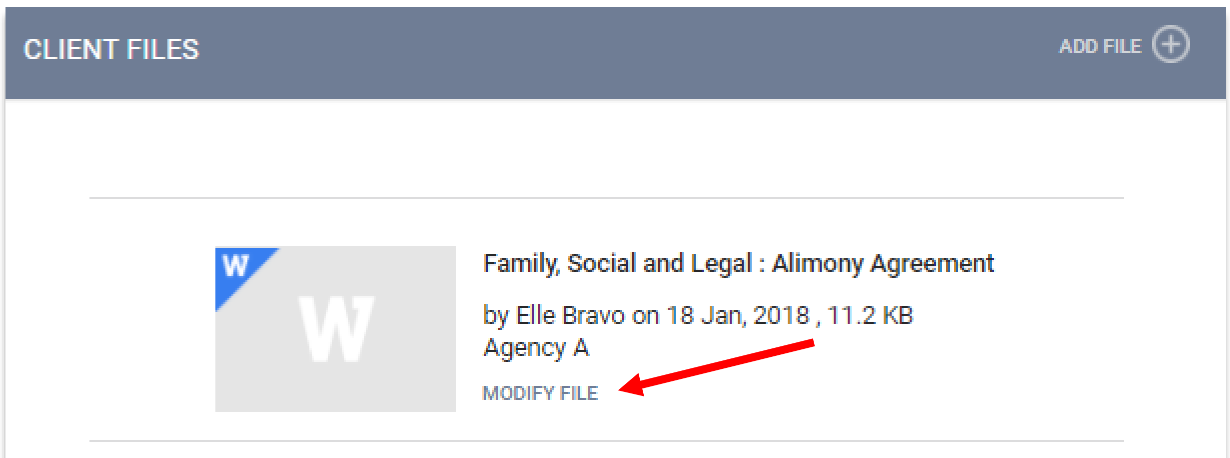


Working with Existing Client Files

The File tab provides the following details for each uploaded file:

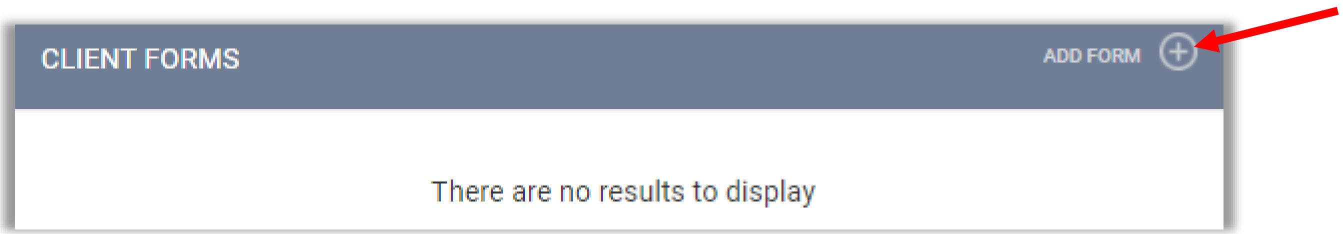
- Category and File Name – selected from drop down menu at the time of upload
- Name of staff member who uploaded the file
- Date of upload
- Size of the file
- Agency associated with the file upload

You can view the existing file by clicking on the icon for the file, or edit the document by uploading a new version via the *Modify file* link (red).



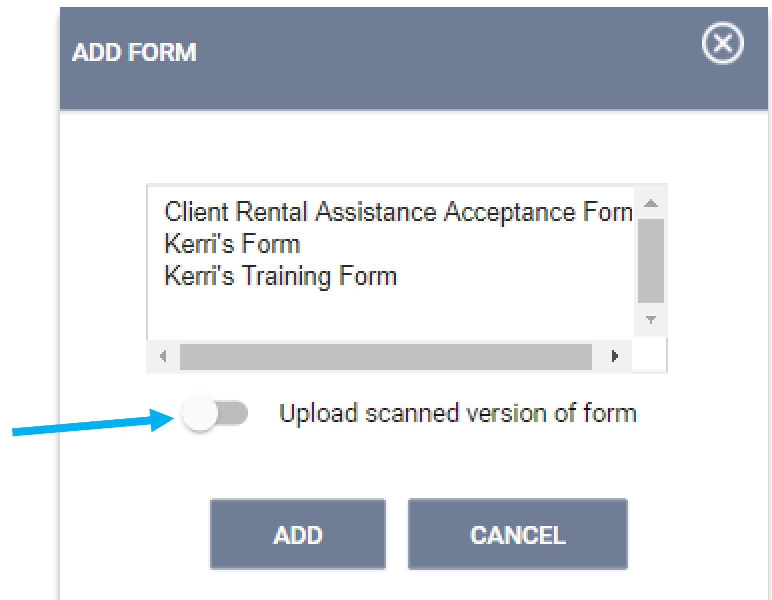
Uploading a Client Form

Click on *Add Form* link right of *Client Forms* (red). A pop up box will appear listing the form options for your particular agency. Click on the desired form.



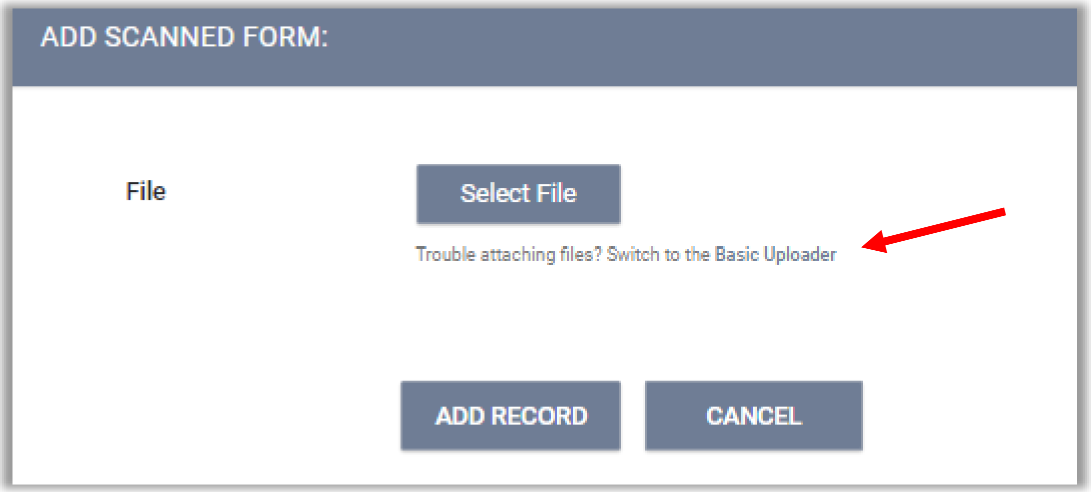
Upload Scanned version of form:

The process for uploading a scanned document is similar to that of uploading a client file. Select *Add Form* and click the toggle box next to *Upload scanned version of form* (blue). Click Add.



Uploading a Client Form- Continued

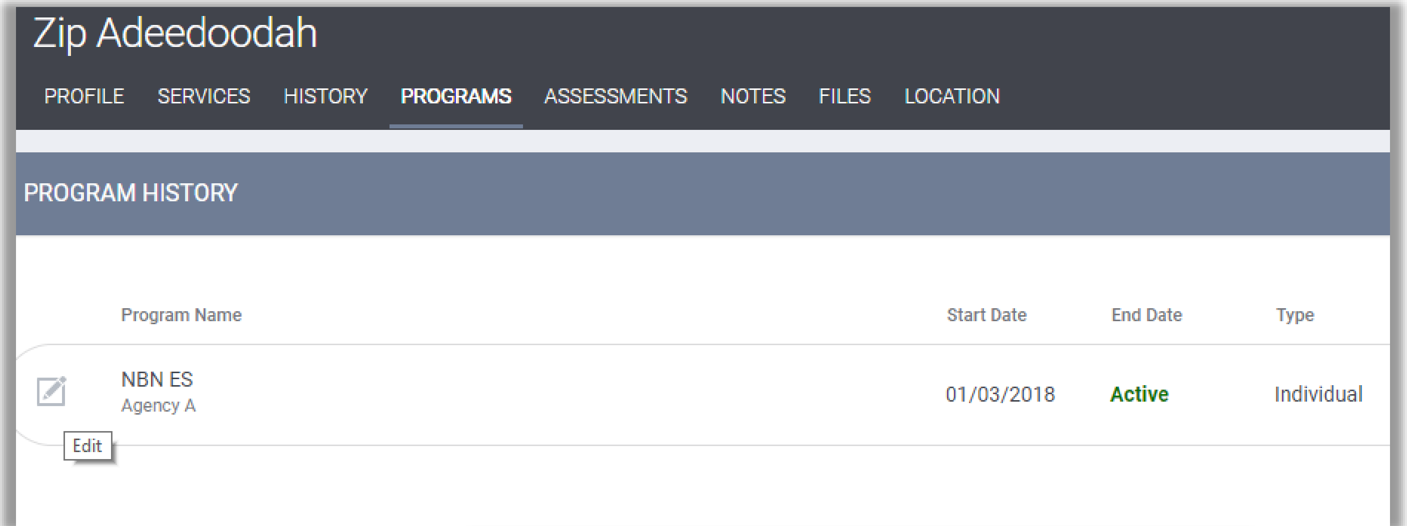
Add Scanned Form page will appear. *Click on* Select File and select your desired file, then click *Add Record*. If your system is not compatible with advanced upload, you can choose the *Basic Uploader (red).*



Reassigning a Case Manager (Assigned Staff)

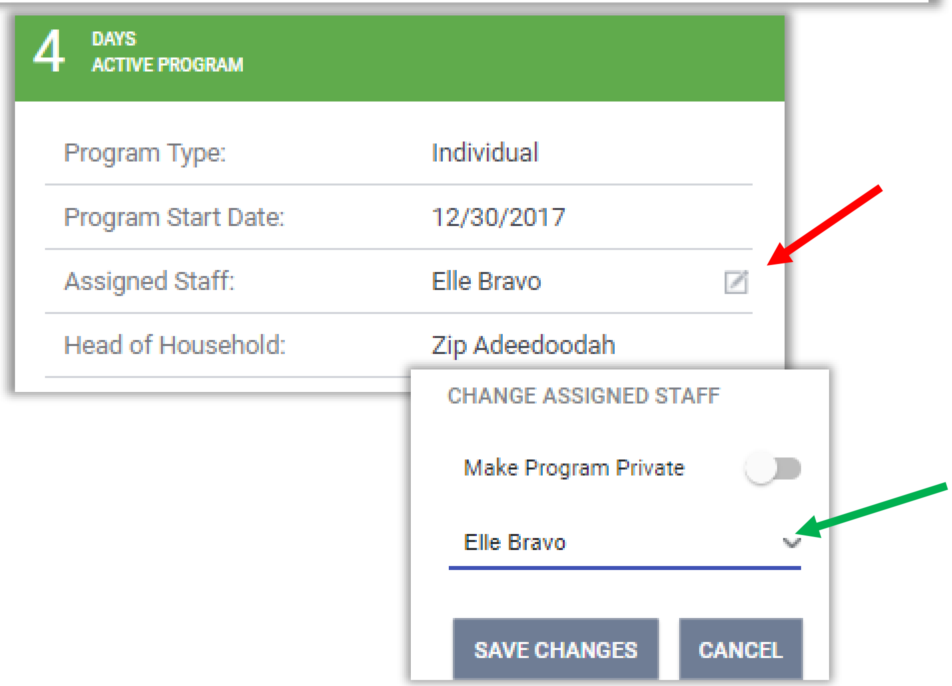
It is by default that Clarity will assign the user who enrolls the client into the Agency Program as the Case Manager (Assigned Staff).

To change client's Case Manager (Assigned Staff), click on *Programs* under client's name. If the client is already enrolled in a program, this will show in the *Program History.* Hover over the program name and click on the edit icon.



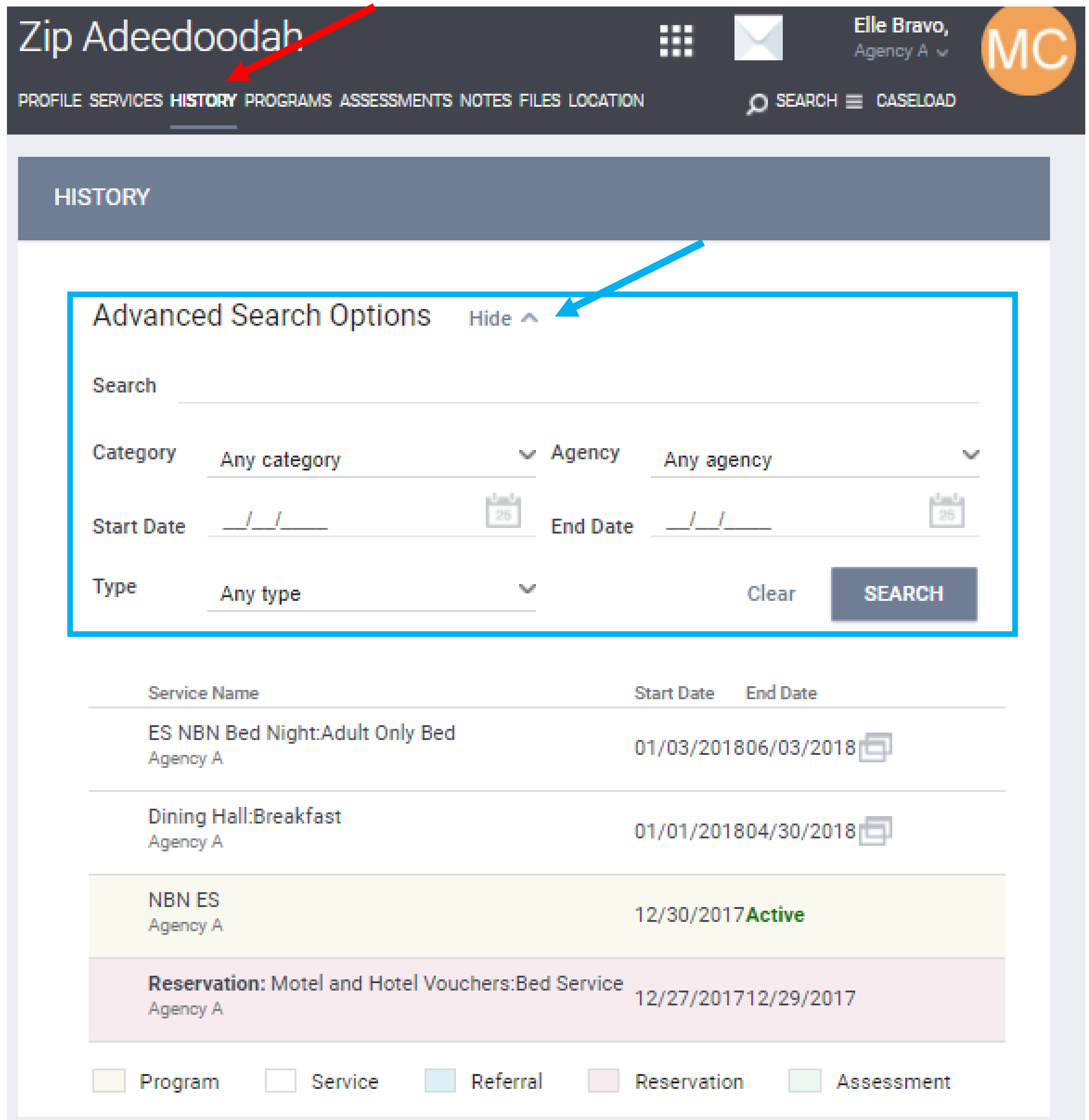
On the right side of the screen in the sideboard- locate the *Assigned Staff* name, click on the edit icon (red) to the right of the name.

A drop down menu will have a list of all the active staff within your agency (green). Choose the new Case Manager (assigned staff) from the list and click *Save Changes.*



Clients History

To access client's history, click on the History tab (red) in the Client record.



Advanced Search Tool

If your client has a very large history spanning multiple pages of results, the *Show Advanced Search Options* feature provides an excellent interface to narrow down your results.

The advanced search options allow the following criteria (blue):

- Name – Filter for a keyword within the service title
- Category – Filter for a specific category of service using the convenient drop-down menu
- Agency – Filter for a specific Agency that provided the service
- Date Range – Filter based on a specific date range of service provision

History Tab Icons

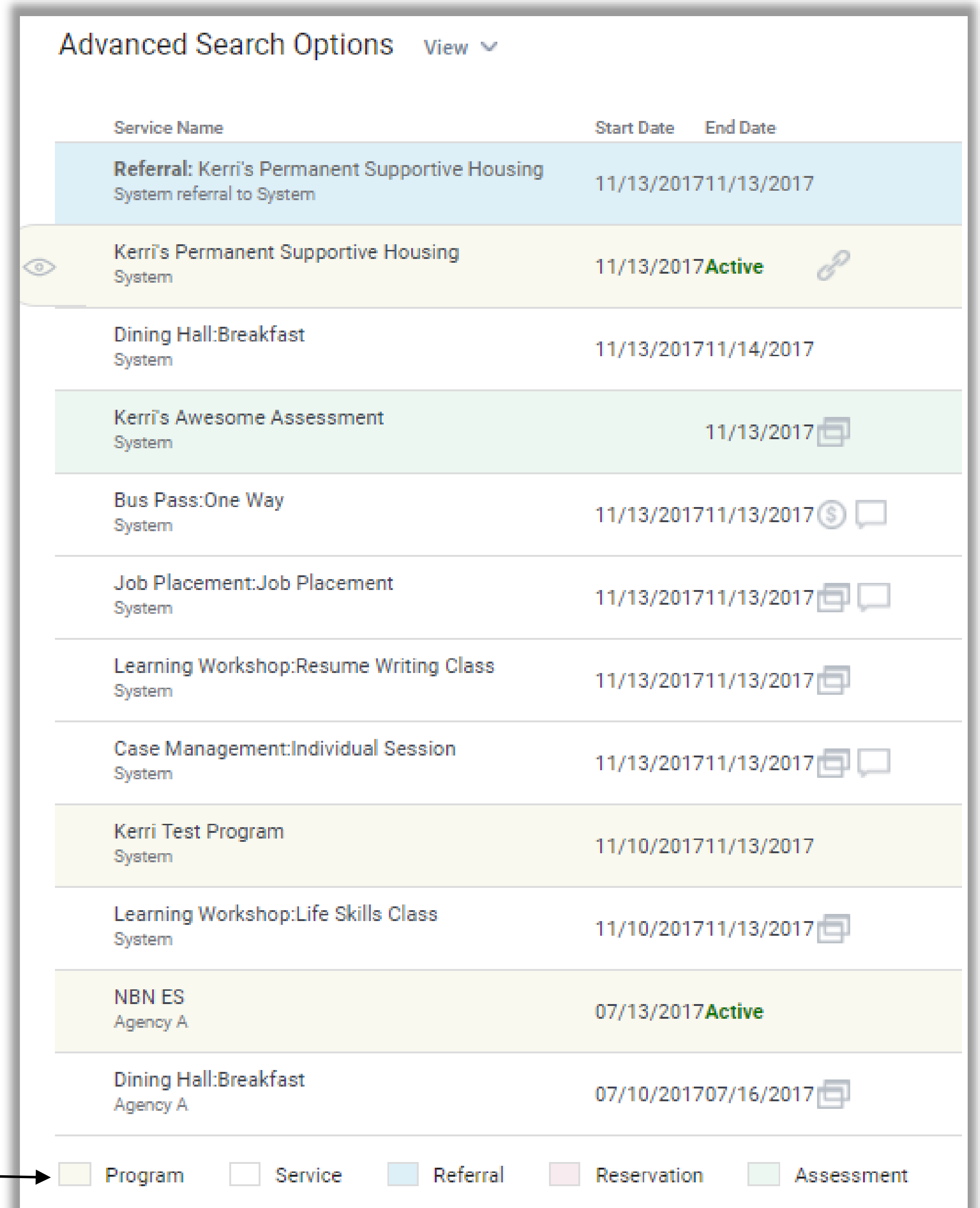
Dollar Icon :
Service transactions with attached expenses. Includes the date and the expense amount.

Link Icon :
Indicates that there is a referral or a service associated with this entry.

Screens Icon :
Indicates that the service is linked to a Program (i.e. Program-Based Service). If you hover over the screens icon, it will provide you with the Program name, associated agency, date of Program entry, and status (active vs. inactive).

The comment icon :
Indicates that there is a Service Note associated with the service. Mouse-over the icon for more details.

The link icon :
indicates that there is a referral or a service associated with this entry. Mouse-over the icon for more details.



Programs, Services, and Assessments, are color-coded to make them easy to distinguish from one another.

Additional Assistance

For any additional technical assistance

Email us: helpdesk@ctagroup.org

OR

By visiting our **Website:** https://ctagroup.org/santa-cruz-hmis/