



Homeless Management Information System

Santa Cruz County Continuum of Care

2019

Clarity HMIS workflow YHDP Adding New Clients



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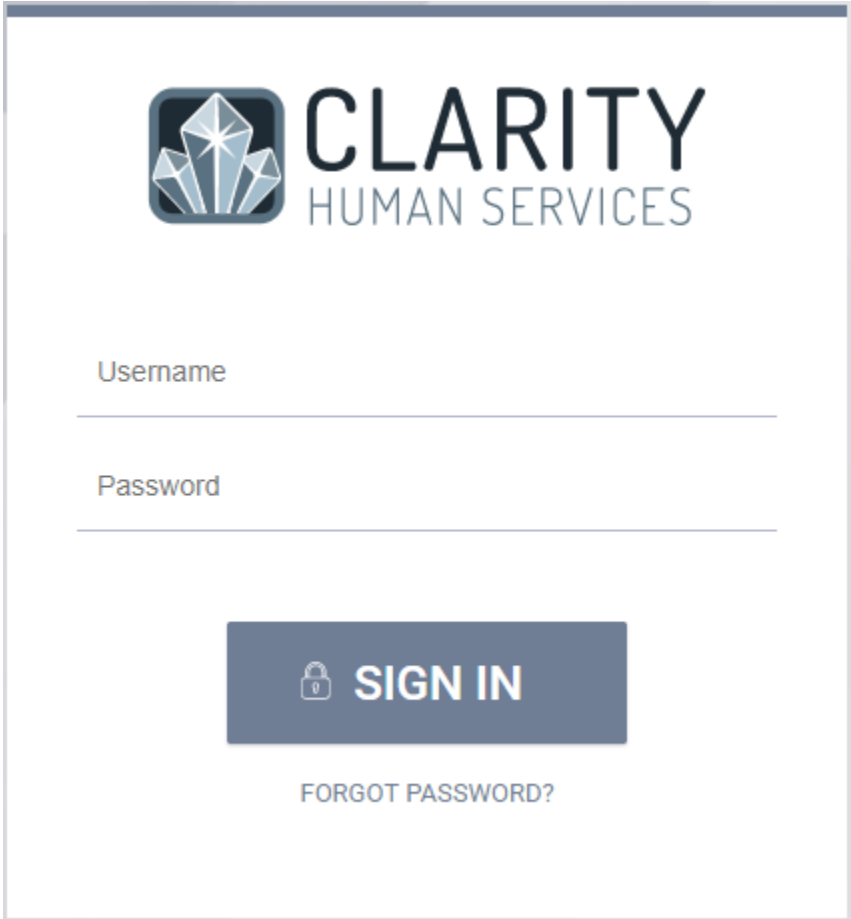
Additional Assistance..... 56

 For any additional technical assistance..... 56

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 !,\$,#,%)

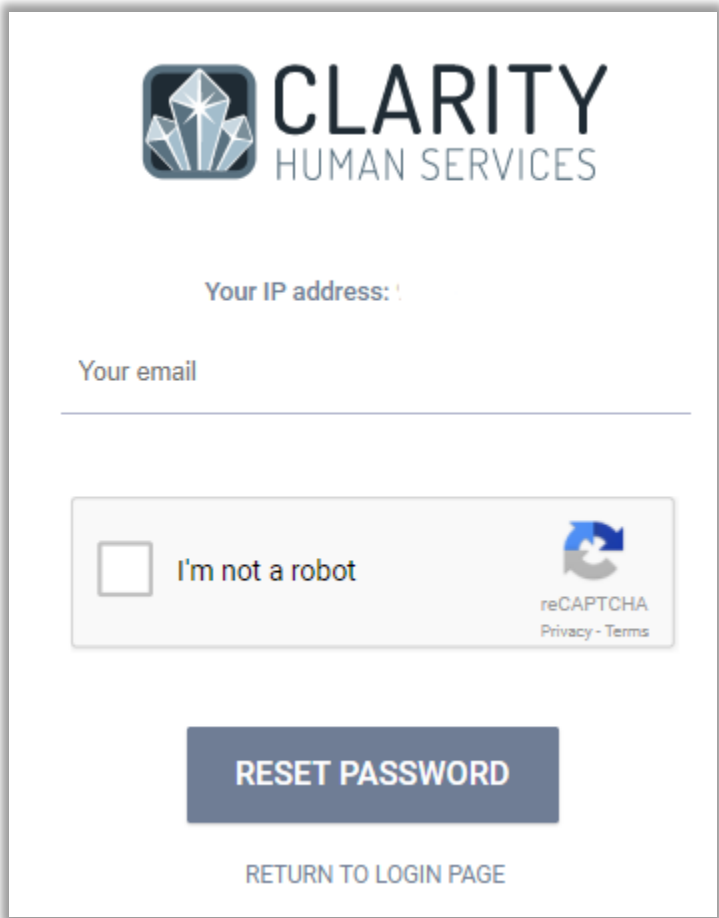
Password can't contain username, can't be a take on the word "clarity", can't be the same one as before.

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.



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' in a sans-serif font. Below the logo, the text 'Your IP address: !' is displayed. A horizontal line separates this from the 'Your email' label, which is positioned above a text input field. Below the email field is a reCAPTCHA widget containing a checkbox labeled 'I'm not a robot' and the reCAPTCHA logo with the text 'reCAPTCHA Privacy - Terms'. At the bottom of the form is a large, dark blue button with the text 'RESET PASSWORD' in white, and below that, a smaller 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).

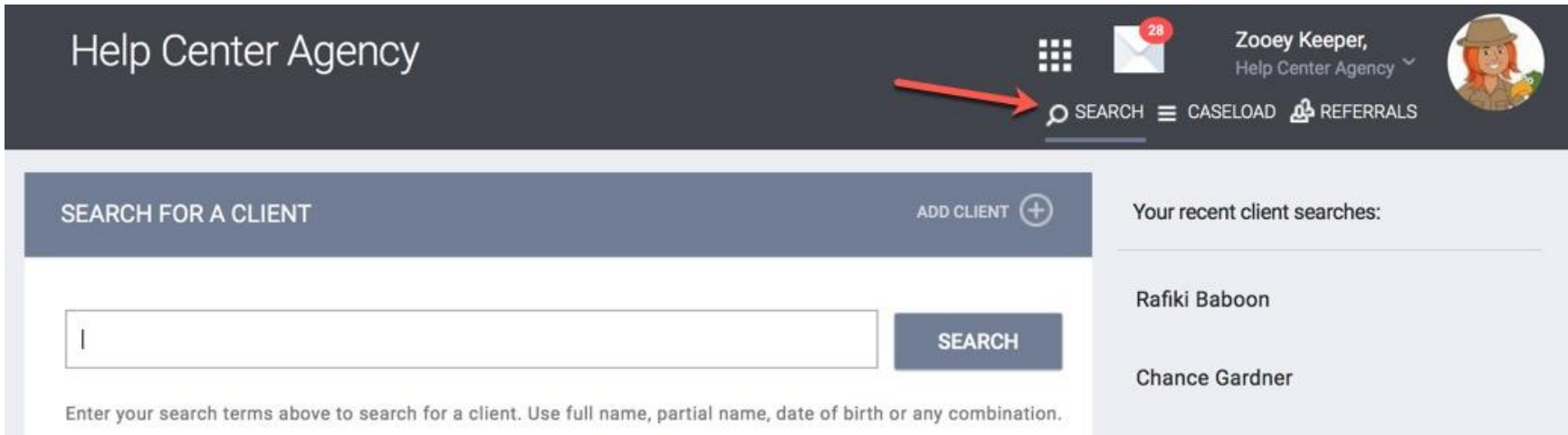
Search for Clients

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 A CLIENT ADD CLIENT (+)

star				SEARCH Last Updated 03/20/18
Arya Stark	07/09/2005	9809		
Orion Belt (12345, Stars, Constellation)	05/04/1988	2154		
Patrick Starr	09/07/2005	9809		
Star Bucks	02/09/1970	1289		

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.

Mufasa Lion

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

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

UNIQUE IDENTIFIER
A06C25B35

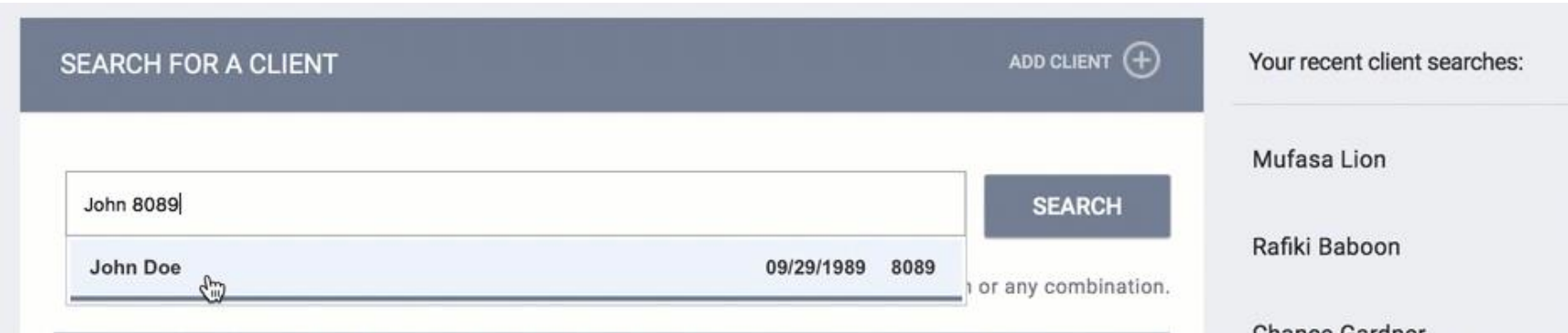
Household Members

Simba Lion	Son
Nala Lioness	Other
Scar Lion	Brother
Sarabi Lion	Wife

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.

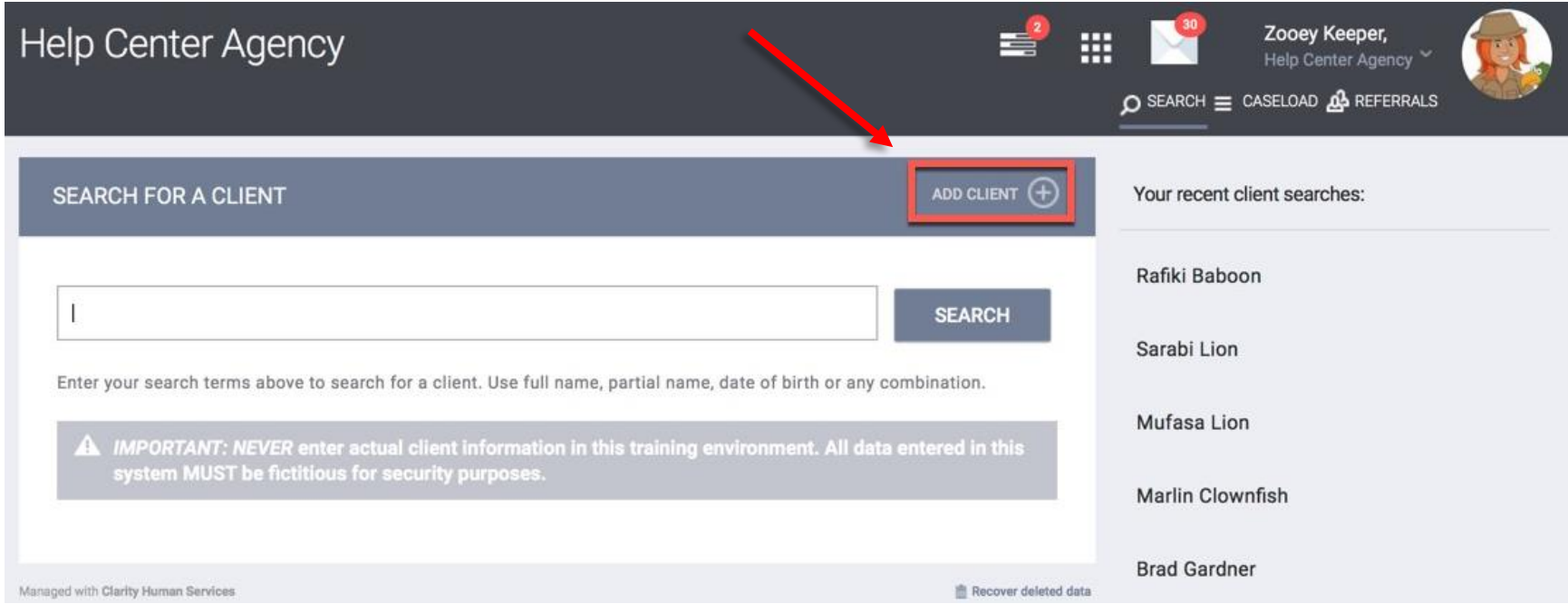


Creating New Client Profile

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: ⚠ Changes have not been saved. Please correct your entry and try again.

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.

CREATE A NEW CLIENT

Social Security Number	<input type="text" value="- - -"/>	
Quality of SSN	<input type="text" value="Select"/>	▼
Last Name	<input type="text"/>	
First Name	<input type="text"/>	
Quality of Name	<input type="text" value="Select"/>	▼
Quality of DOB	<input type="text" value="Select"/>	▼
Date of Birth	<input type="text" value="01/01/1980 "/>	Adult. Age: 38
Middle Name	<input type="text" value="None"/>	▼
Alias	<input type="text"/>	
Gender	<input type="text" value="Select"/>	▼
Race	<input type="text" value="Select"/>	▼
Ethnicity	<input type="text" value="Select"/>	▼
Disabling Condition	<input type="text" value="Select"/>	▼
Veteran Status	<input type="text" value="Select"/>	▼
Primary Phone Number	<input type="text" value="XXX-XXX-XXXX"/>	

Please fill in Release of Information form
CANCEL

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.

The screenshot displays a web application interface for creating a new client profile. The main form is titled "CREATE A NEW CLIENT" and contains the following fields:

- Social Security Number: 345 - 93 - 5982
- Quality of SSN: Full SSN Reported
- Last Name: Duke
- First Name: Daisy
- Quality of Name: Full name reported
- Quality of DOB: Full DOB Reported
- Date of Birth: 08/08/1989 (Adult. Age: 28)
- Middle Name: None
- Alias: Jessica
- Gender: Female
- Race: White
- Ethnicity: Non-Hispanic/Non-Latino
- Veteran Status: No

On the right side, there is a sidebar titled "RELEASE OF INFORMATION" with the following fields:

- Permission: Yes
- Start Date: 11/03/2017
- End Date: 11/03/2022
- Documentation: Select

At the bottom of the form, a red box highlights a message: "Please fill in Release of Information form". A "CANCEL" button is also visible.

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.

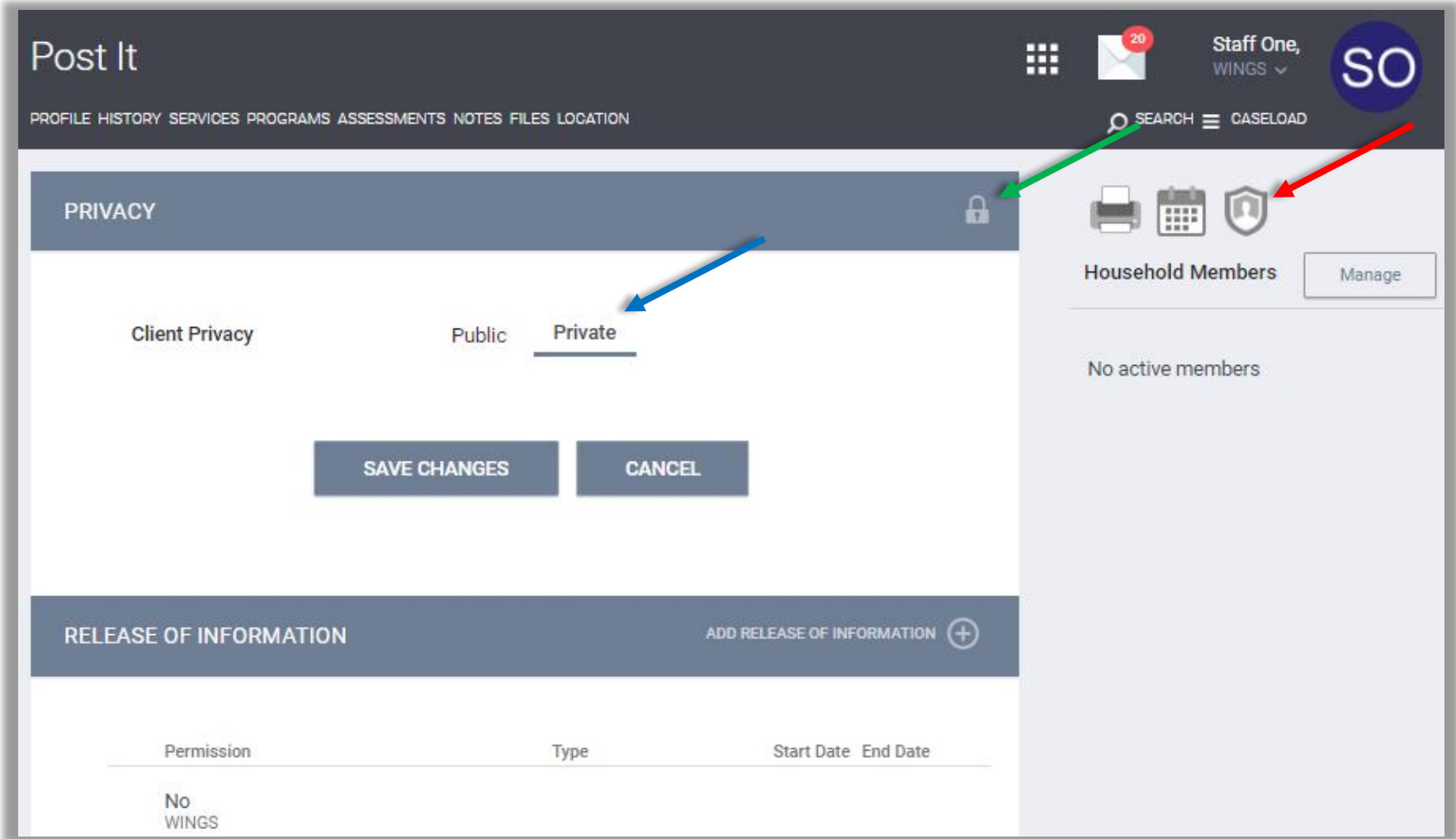
Select **ADD RECORD** once all data have been entered.

The screenshot shows a form titled "RELEASE OF INFORMATION" with the following fields:

Permission	Yes	▼
Start Date	11/03/2017	📅
End Date	11/03/2022	📅
Documentation	Select	▼

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.

Daffy Duck

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

CLIENT PROFILE

Social Security Number	XXX - XX - 0459
Quality of SSN	Full SSN Reported
Last Name	Duck
First Name	Daffy
Quality of Name	Full name reported



UNIQUE IDENTIFIER
FAD1B36C1


Household Members


No active members

Manage

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).

Pumba Warthog

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

HOUSEHOLD MANAGEMENT

Search for a Household Member

rafiki 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
Join Rafiki Baboon Existing Group. Head of Household: Mufasa Lion . Members: 6	03/09/00	1111	08/28/17

BACK


Household Members

Pumba Warthog	Other ★
Timon Meercat	Other

Your recent client searches accessed:

Daffy Duck	0459
Rafiki Baboon	1111
Mufasa Lion	4589
Marlin Clownfish	7898
Daisy Duck	1329

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.



Household Members


Michael Jackson	Not Set ★
Zip Adeedoodah	Nephew 


Your recent client searches accessed:


Spongebob Squarepants	0980
Batman Im	6789


EDIT GLOBAL HOUSEHOLD 

Member Type: Nephew  

Head of Household: Michael Jackson 

Joined Household: 12/11/2017 

Exited Household: 



December 2017

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

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.

The screenshot shows a web interface for a client profile. The main area displays the client's information, including Social Security Number, Name, Date of Birth, and a Unique Identifier. The right sidebar, highlighted with a red border, contains several sections:

- Household Members:** A list of family members with their names and relationships.

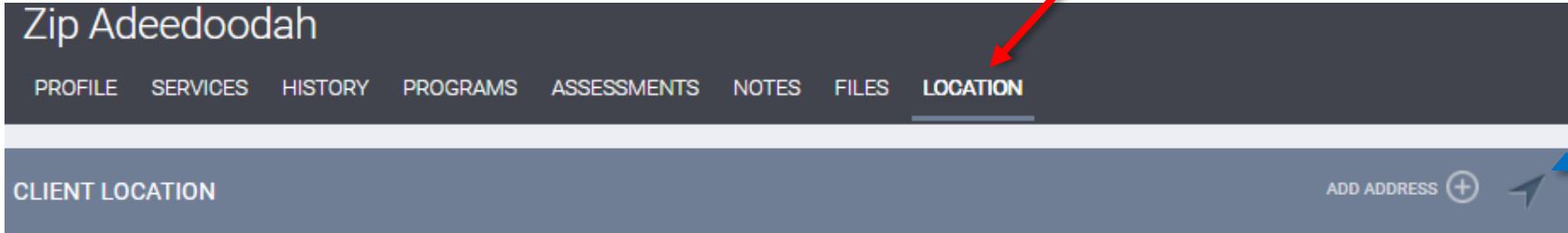
Name	Relationship
Michael Jackson	Father*
Prince Charming	Grandparent
Cat Hat	Wife
- Active Services:** A list of services currently being provided to the client.
 - ES NBN Bed Night:Adult Only Bed
 - Dining Hall:Breakfast
- Active Programs:** A list of programs the client is enrolled in.
 - NBN ES
- Assigned Staff:** A section showing the number of staff assigned to the client, indicated by a '1' in a circle.

At the bottom of the sidebar is the 'MC' logo. The main profile area includes a 'CLIENT PROFILE' header, a navigation menu (PROFILE, SERVICES, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, LOCATION), and a 'CLIENT PROFILE' section with fields for Social Security Number, Quality of SSN, Last Name, First Name, Quality of Name, Quality of DOB, and Date of Birth. A 'UNIQUE IDENTIFIER' box displays '7E63C28C2'. At the bottom of the main area are 'SAVE CHANGES' and 'CANCEL' buttons.


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.

CLIENT LOCATION


Address Type	Home	▼
Name	<input type="text"/>	
Address (line 1)	<input type="text"/>	
Address (line 2)	<input type="text"/>	
City	<input type="text"/>	
State	CA - California	▼
Zip Code	<input type="text"/>	
Email	<input type="text"/>	
Phone (#1)	<input type="text"/>	
Phone (#2)	<input type="text"/>	
Status	<input checked="" type="checkbox"/>	


ADD RECORD **CANCEL**

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

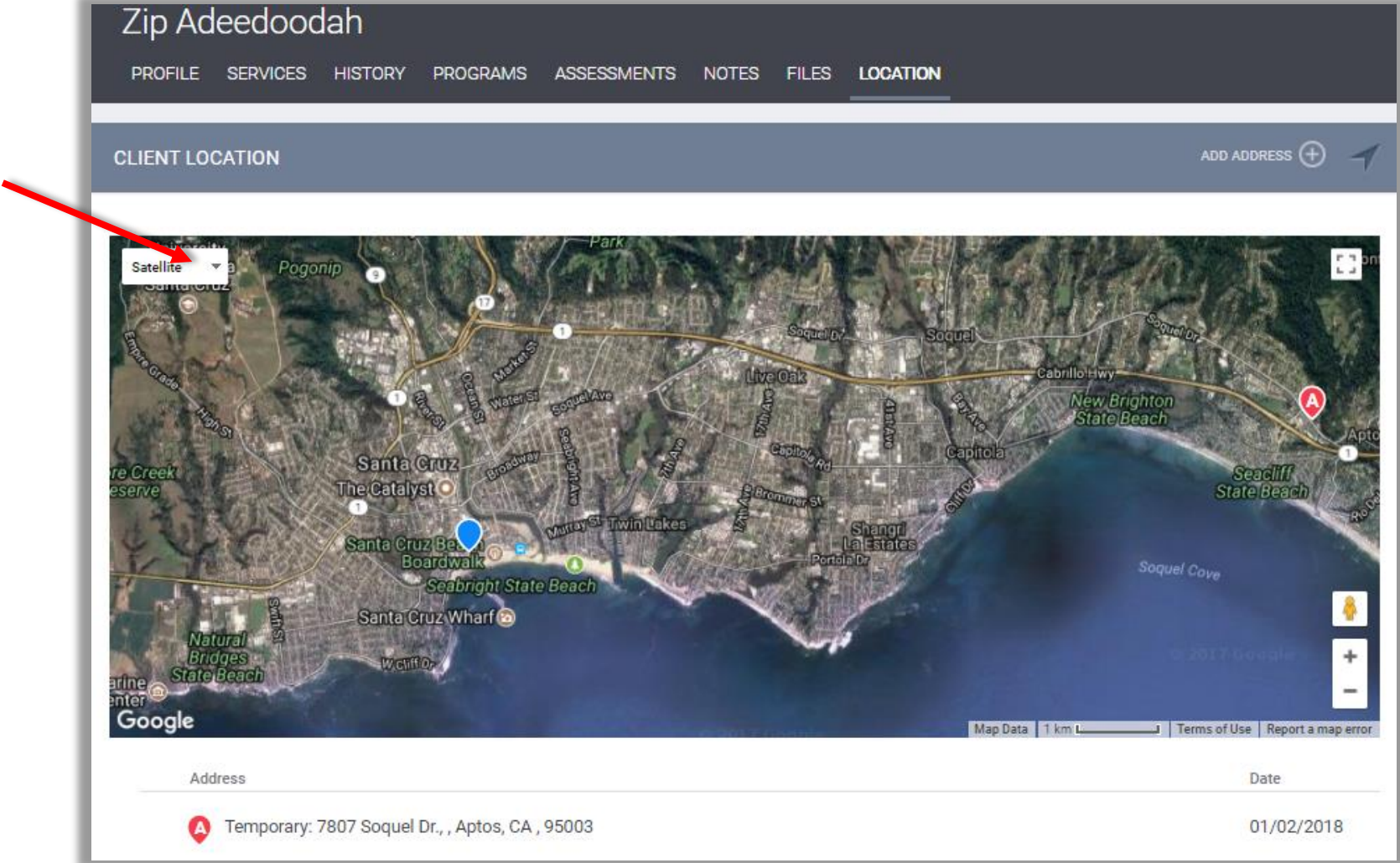
Client Location Distance to Agency

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).

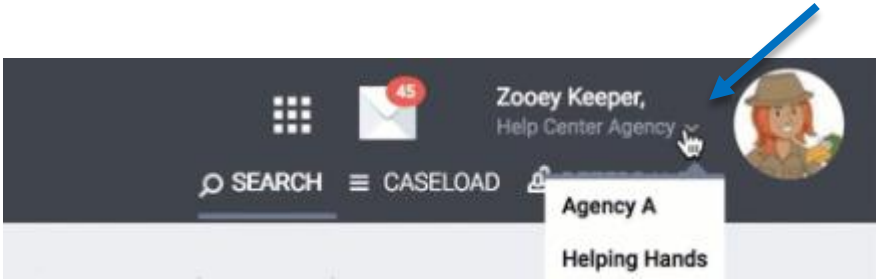


The screenshot shows a web application interface for a client profile. At the top, there is a navigation bar with tabs: PROFILE, SERVICES, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, and LOCATION. Below this is a header for 'CLIENT LOCATION' with an 'ADD ADDRESS' button and a location pin icon. The main content area features a Google Map of Santa Cruz, California. A red arrow points to a dropdown menu in the top-left corner of the map, which currently shows 'Satellite'. The map displays several pins: a blue pin near Santa Cruz Boardwalk and a red pin near Seacliff State Beach. Below the map, there is a table with columns for 'Address' and 'Date'. The table contains one entry: a red pin icon followed by the address 'Temporary: 7807 Soquel Dr., , Aptos, CA , 95003' and the date '01/02/2018'.

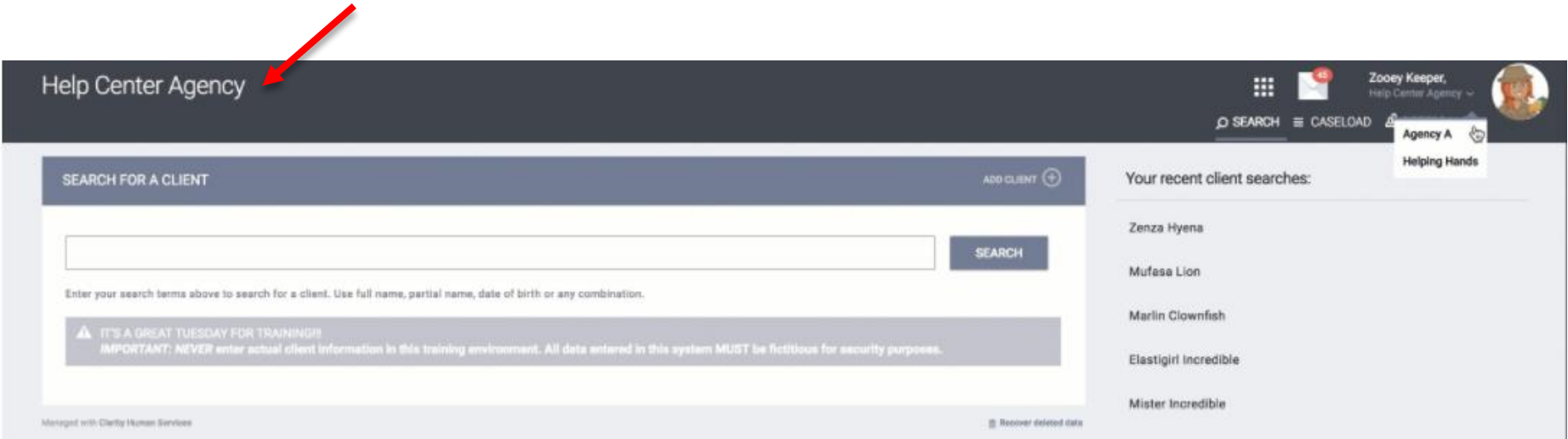
Address	Date
 Temporary: 7807 Soquel Dr., , Aptos, CA , 95003	01/02/2018

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).



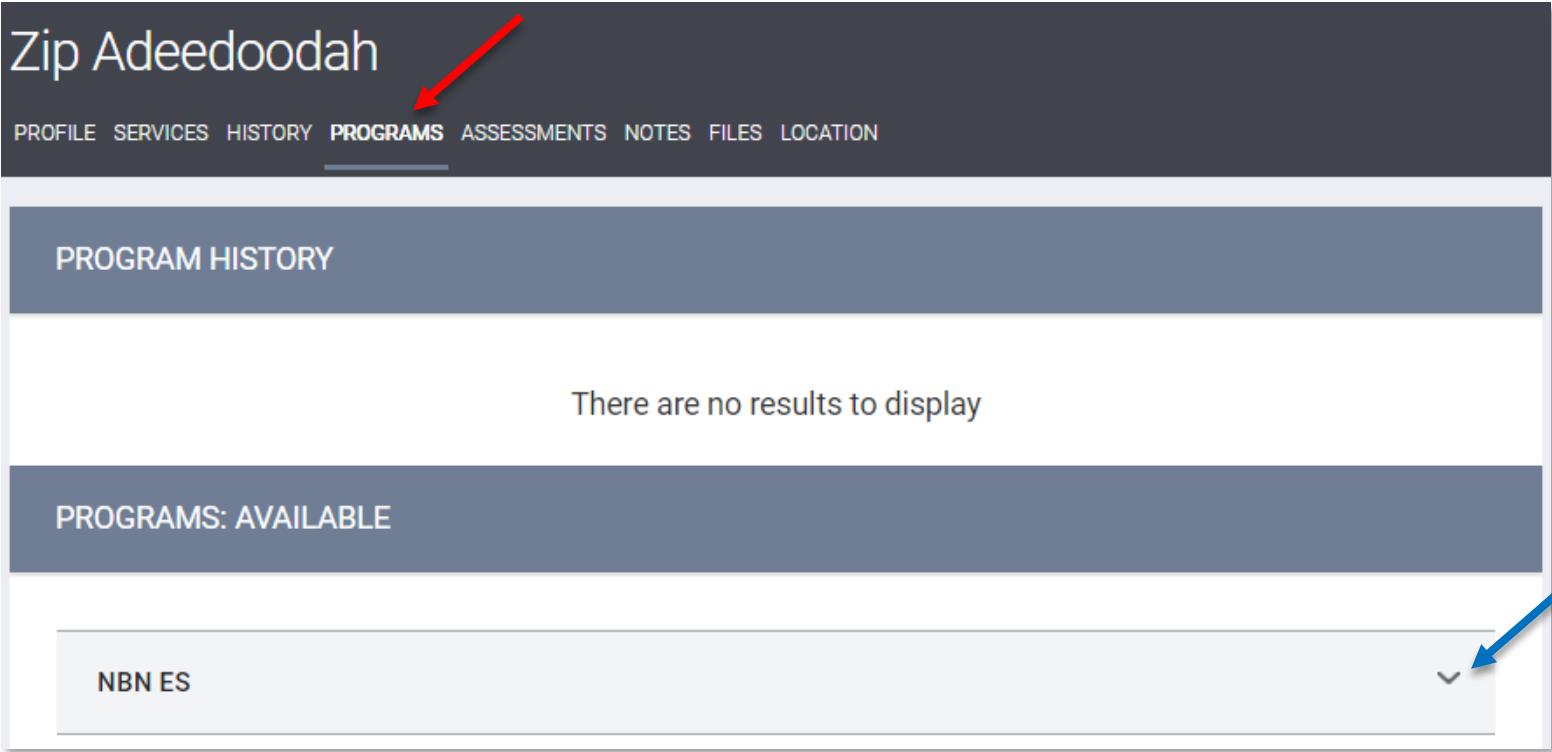
Program Based Transaction

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.

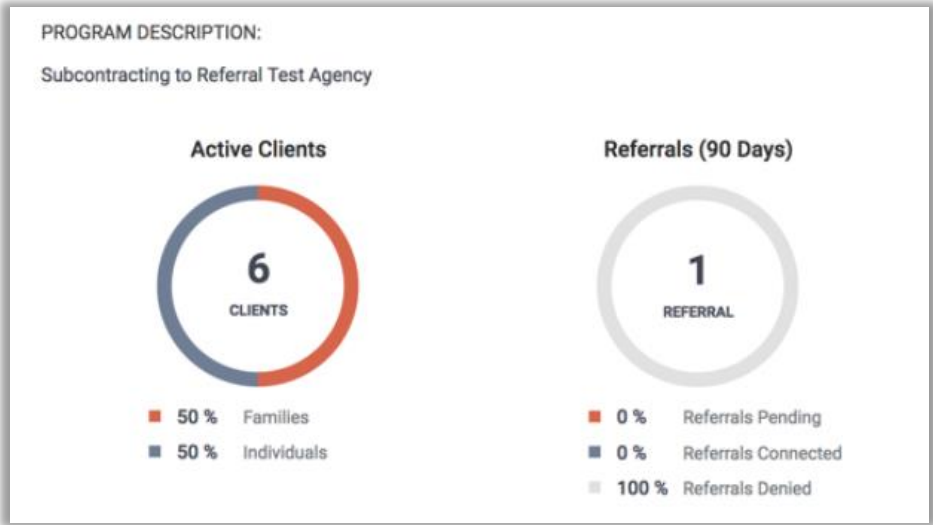
Programs: Available- Lists current programs provided by your agency that are available for client enrollment.

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).



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. Housing, Employment).

Include group members:

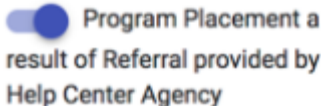
- Nala Lioness
- Sarabi Lion
- Scar Lion
- Simba Lion

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 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 programmed 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

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.


COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date 

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.

COMPLETE DATE OF ENGAGEMENT WHEN CLIENT HAS BEEN ENGAGED

Date of Engagement 

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

Developmental Disability Yes Substantially Impairs Independence

Chronic Health Condition Yes Long Term

HIV - AIDS Yes Substantially Impairs Independence

Mental Health Problem Yes Long Term

Substance Abuse Problem Both Alcoho Long Term

Domestic Violence Victim/Survivor Yes Last Occurrence

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

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.



YHDP Questions

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

YHDP			
Sexual Orientation	Select		▼
Last Grade Completed	Select		▼
School Status	Select		▼
Employed	Select		▼
General Health	Select		▼
Mental Health Status	Select		▼
Pregnancy Status	Yes ▼	Pregnancy Due Date	__ / __ / __ 
Formerly a Ward of Child Welfare or Foster Care Agency	Yes		▼
Formerly a Ward of Child Welfare or Foster Care Agency - Number of Years	Less than one year ▼	Number of Months	Select ▼
Formerly a Ward of the Juvenile Justice System	Select		▼

SAVE & CLOSE CANCEL

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)


The screenshot shows a software interface for managing YHDP services. At the top left, the text 'YHDP' is displayed. At the top right, there is a label 'RHY Service' followed by an upward-pointing arrow. Below this, a list of service categories is presented, each with a vertical bar on the left and a downward-pointing arrow on the right. A red arrow points to the first service, 'Community service/service learning (CSL)'. The list includes:

- Community service/service learning (CSL)
- Criminal justice /legal services
- Education
- Employment and/or training services
- Health/medical care
- Life skills training
- Parenting education for youth with children
- Post-natal care for mother
- Post-natal newborn care (wellness exams; immunizations)
- Pre-natal care
- Substance Abuse Ed/Prevention Services
- Substance abuse treatment

Program- Services Description

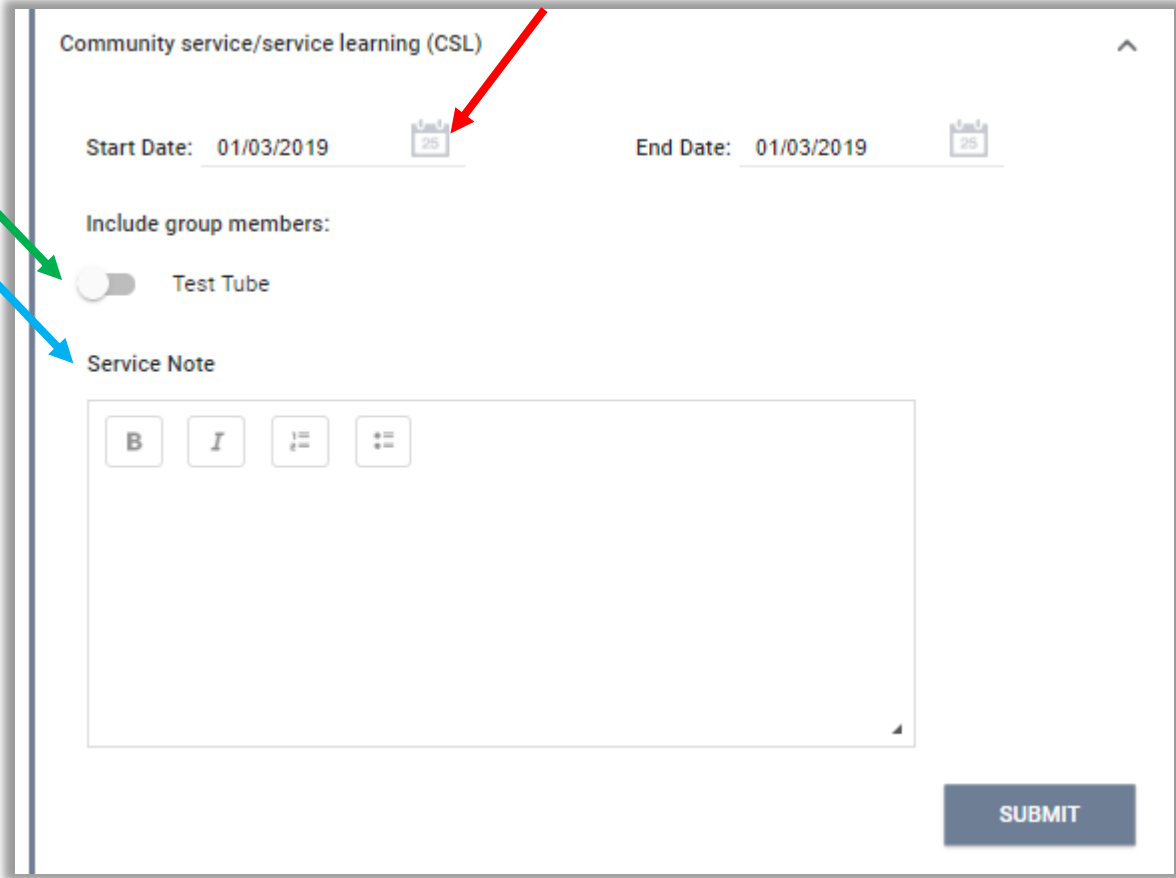
1. **Community service/service learning (CSL):** Activities that involve youth in helping others or the community.
2. **Criminal justice/legal services:** Legal services or guidance provided through an attorney or an attorney-supervised paralegal.
3. **Education:** Includes learning disability assessment, 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.





Community service/service learning (CSL)

Start Date: 01/03/2019  End Date: 01/03/2019 

Include group members:

Test Tube

Service Note

B *I*  

SUBMIT

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).

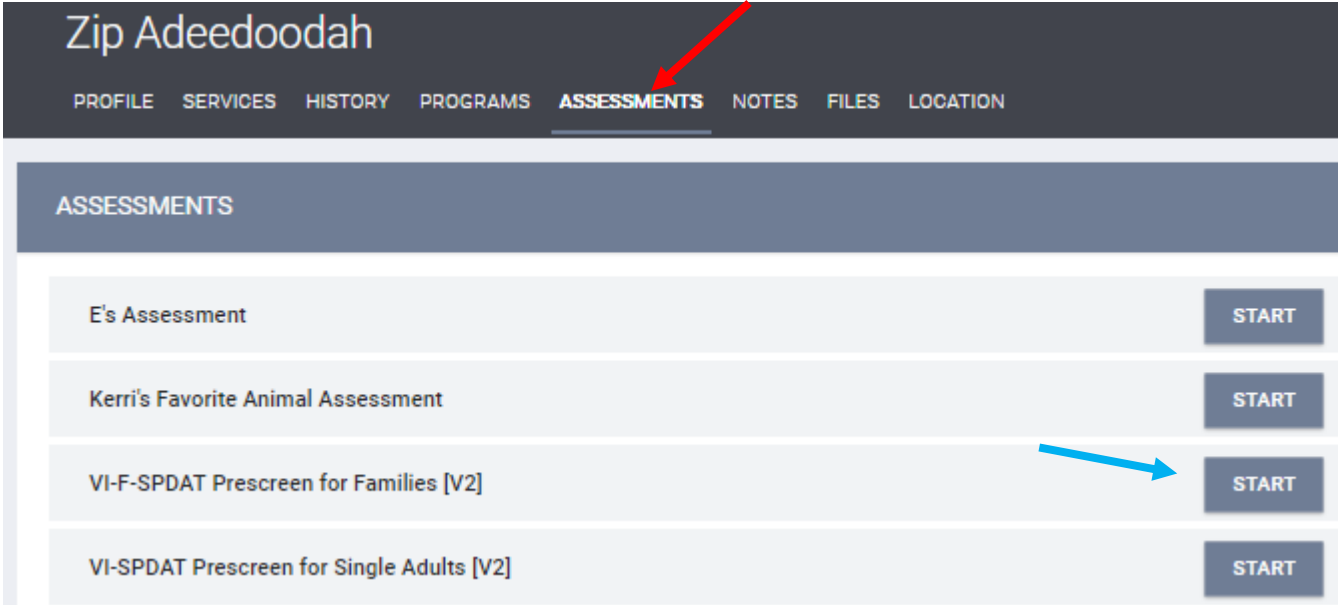
The screenshot shows the 'Big Bird' client management interface. At the top, there is a navigation bar with the client name 'Big Bird', a grid icon, an envelope icon, and the user 'Elle Bravo, Agency A'. Below this is a secondary navigation bar with tabs for PROFILE, SERVICES, HISTORY, PROGRAMS, ASSESSMENTS (which is highlighted), NOTES, FILES, LOCATION, and REFERRALS. There are also search and case load icons. The main content area is titled 'ASSESSMENTS' and contains a list of six assessment items, each with a 'START' button:

- E's Assessment
- Kerri's Favorite Animal Assessment
- VI-F-SPDAT Prescreen for Families [V1]
- VI-F-SPDAT Prescreen for Families [V2]
- VI-SPDAT Prescreen for Single Adults [V1]
- VI-SPDAT Prescreen for Single Adults [V2]

At the bottom of the interface, there is a dark blue bar labeled 'ASSESSMENT HISTORY'. A red arrow points from the text in the previous block to this 'ASSESSMENT HISTORY' bar.

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).

PROGRAM ELIGIBILITY DETERMINATION

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	1	RISKS	2
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	2

VI-SPDAT-V2 PRE-SCREEN TOTAL 8

REFER DIRECTLY TO COMMUNITY QUEUE

Category -- All Categories Agency -- All Agencies Availability -- All -- **SEARCH**

CANCEL



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.

REFERRAL: ADD

Referred Program	Community Queue
Referred to Agency	Community Queue
Referring Agency	Agency A
Private	<input type="checkbox"/>

B Bold
I Italic
☰ Numbers
☰ Bullets

SEND REFERRAL

CANCEL

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).


Spring Love

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION

Elle Bravo, Agency A

SEARCH CASELOAD

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
 Kerri's Program A Agency A	03/08/2018	Active	Group
NSEW Program Compass	03/08/2018	Active	Individual

PROGRAMS: AVAILABLE

NBN ES

Managed with Clarity Human Services

Household Members Manage

Spring Kid Daughter

Active Services


ES NBN Bed Night:Adult Only Bed

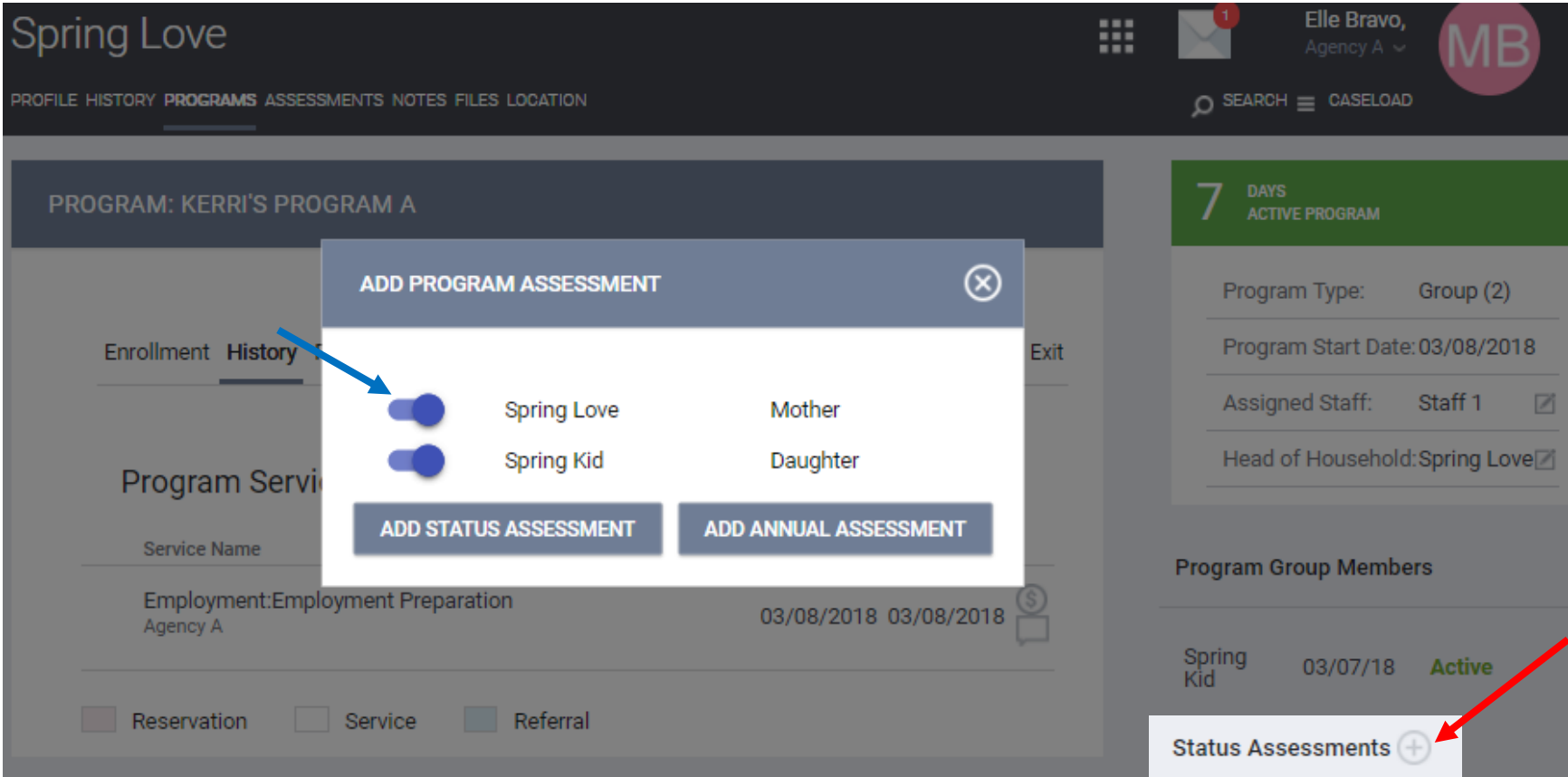
Active Programs

Kerri's Program A

NSEW Program

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.

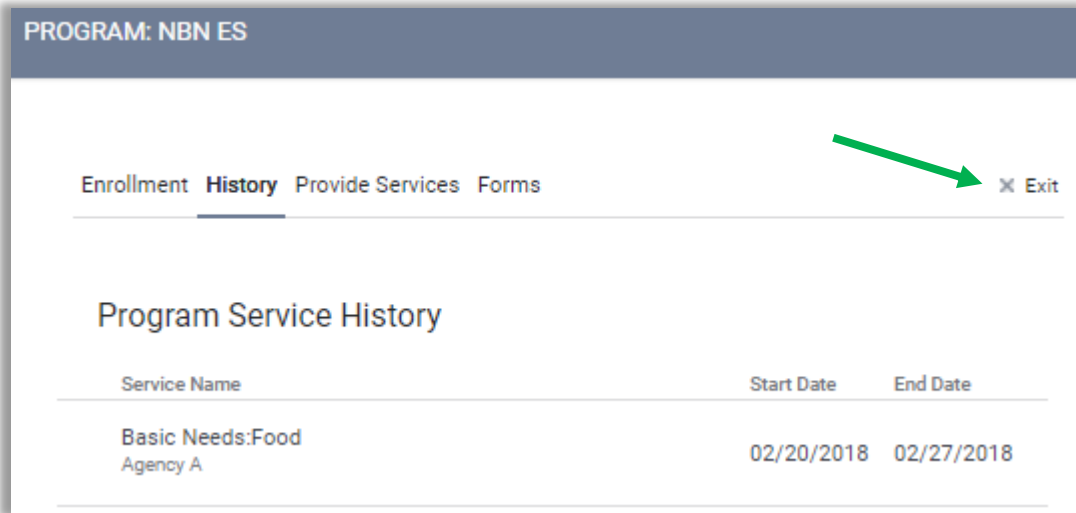
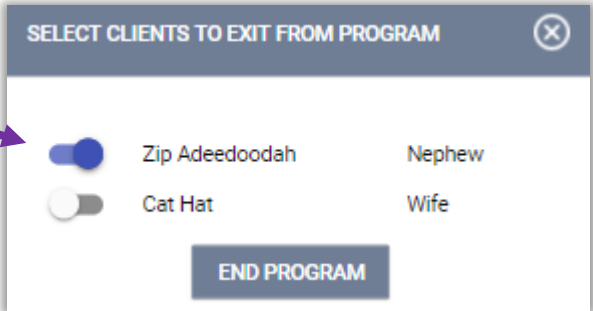
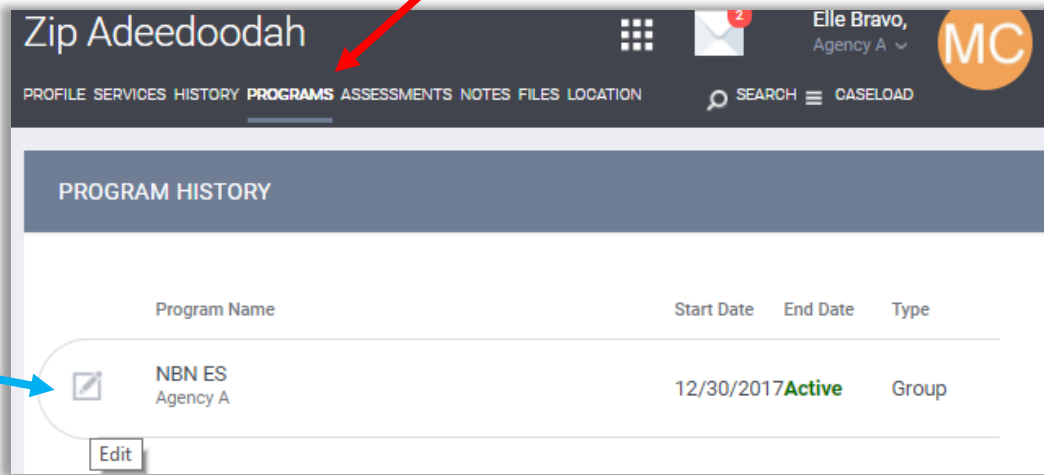
The screenshot shows a web application interface for 'Spring Love'. At the top, there is a navigation bar with 'PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES LOCATION'. The 'PROGRAMS' tab is selected. On the right, there is a user profile for 'Elle Bravo, Agency A' and a notification icon with a red '1'. Below the navigation bar, a dark blue header displays 'PROGRAM: KERRI'S PROGRAM A'. A secondary navigation bar includes 'Enrollment History Provide Services Assessments Notes Files Forms' and an 'Exit' button. The 'Assessments' tab is highlighted with a red arrow. Below this, a list of assessments is shown with 'START' buttons. A blue arrow points to the 'START' button for the 'Status Update Assessment'. To the right, a sidebar contains a green box indicating '7 DAYS ACTIVE PROGRAM', program details like 'Program Type: Group (2)', 'Program Start Date: 03/08/2018', and 'Assigned Staff: Staff 1'. At the bottom of the sidebar, there is a 'Program Group Members' section with a table listing 'Spring Kid' as 'Active' on '03/07/18', and a 'Status Assessments' section with a date '03/16/2018' and a green 'STATUS' button.

Assessment Type	Action
Status Update Assessment	START
Annual Assessment	START
Kerri's Awesome Assessment	START
Kerri's Favorite Animal Assessment	START

Member Name	Date	Status
Spring Kid	03/07/18	Active

Exiting a Client from a Program

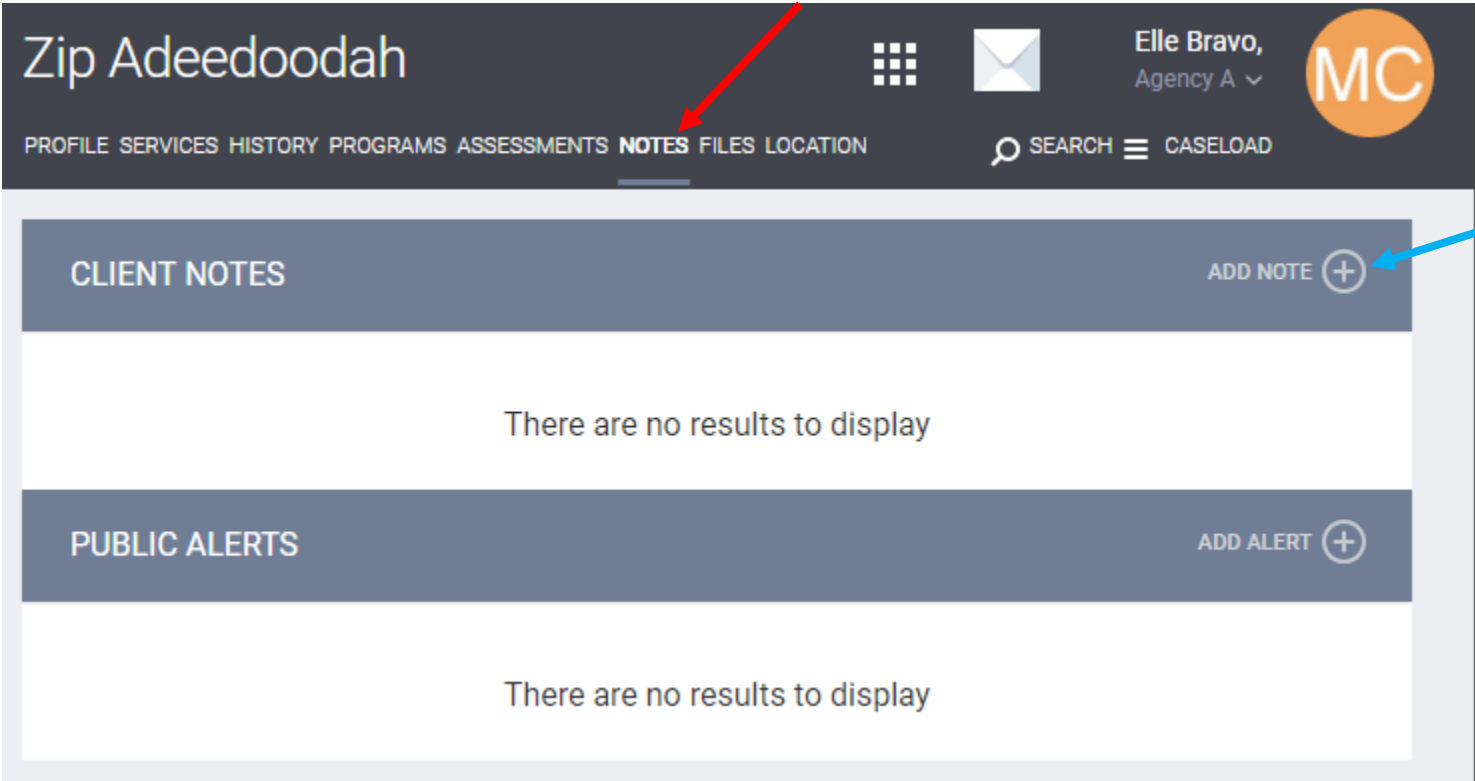
To exit a client from a program, go to the Programs tab (red) from the client's record, mouse over the program name, and select the Edit icon (blue) that appears to the left. Once you are in the program edit screen, click the Exit button to the right (green).



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.

The screenshot shows a web form titled "CLIENT NOTES". It contains the following fields and elements:

- Title:** A text input field containing "Goal Discussion".
- Agency:** A text input field containing "Agency A".
- Date:** A date picker showing "01/22/2018".
- Time Tracking:** A section with "Time Tracking:" followed by two dropdown menus. The first dropdown is set to "1 hour" and the second to "15 min".
- Note:** A rich text editor area with a toolbar containing "Bold", "Italic", "Numbers", and "Bullets" buttons. The text area contains the following content:

Had initial discussions today with Zip Adeedoodah to review his personal goals.

 - Always have a wonderful day.

At the bottom of the form are two buttons: "ADD RECORD" and "CANCEL".

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 **ADD ALERT** 

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.

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

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


Big Bird

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



PUBLIC ALERTS

Title Shelter Bed Assignment

Agency Agency A

Expiration Date 01/20/2018 

Note

B Bold *I Italic*  Numbers  Bullets

Please ensure that Big Bird and his brother Little Bird are assigned a bed within the same building.

Private

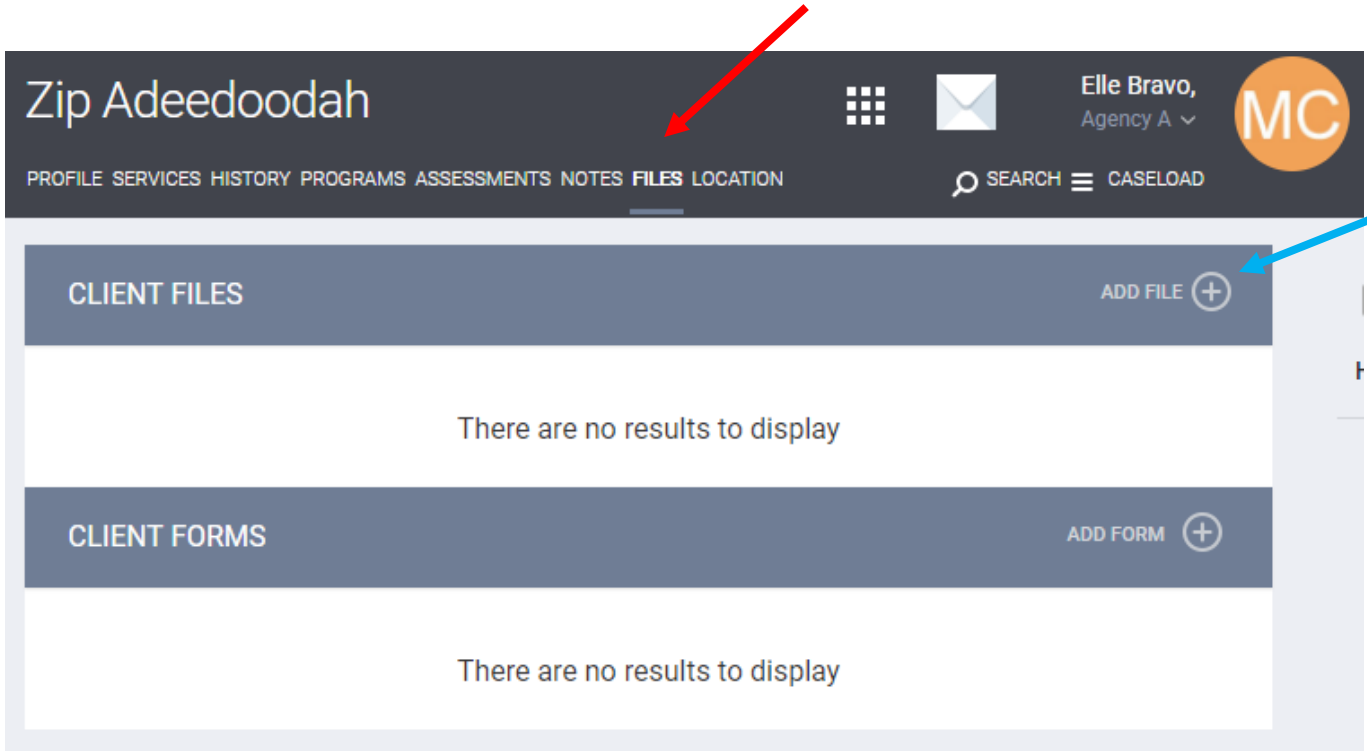
ADD RECORD **CANCEL**

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.)*

The screenshot shows a form titled "UPLOAD A FILE" with the following fields and controls:

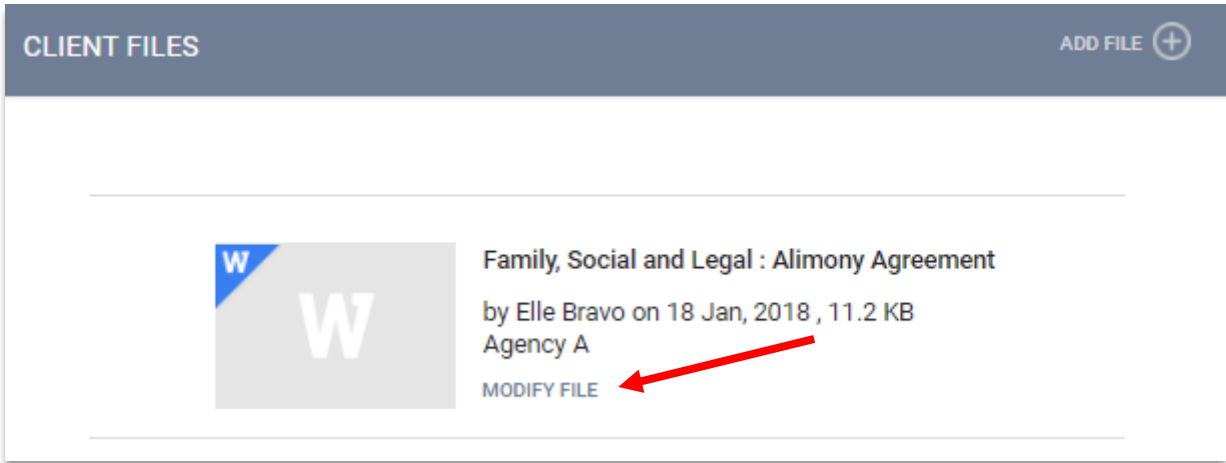
- Category:** A dropdown menu with "Family, Social and Legal" selected. A red arrow points to the dropdown arrow.
- Name:** A dropdown menu with "Alimony Agreement" selected. A red arrow points to the dropdown arrow.
- File:** A "Select File" button.
- Basic Uploader:** A link labeled "Basic Uploader" with a blue border, preceded by the text "Trouble attaching files? Switch to the".
- Buttons:** "ADD RECORD" and "CANCEL" buttons at the bottom.

Working with Existing Client Files

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

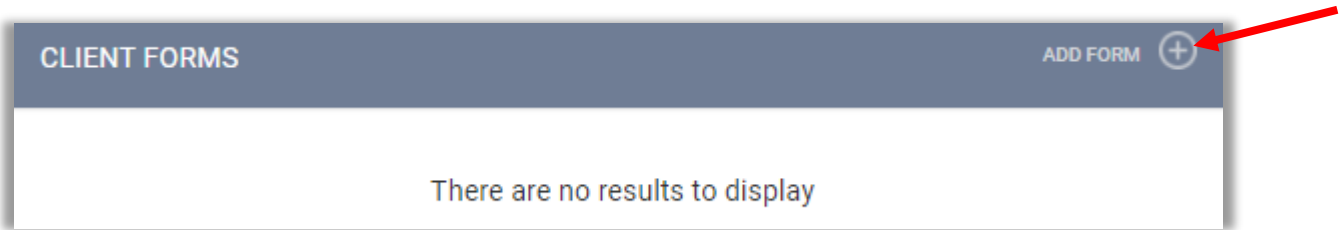
- Category and File Name – selected from drop down menu at the time of upload
- Name of staff member who uploaded the file
- Date of upload
- Size of the file
- Agency associated with the file upload

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).



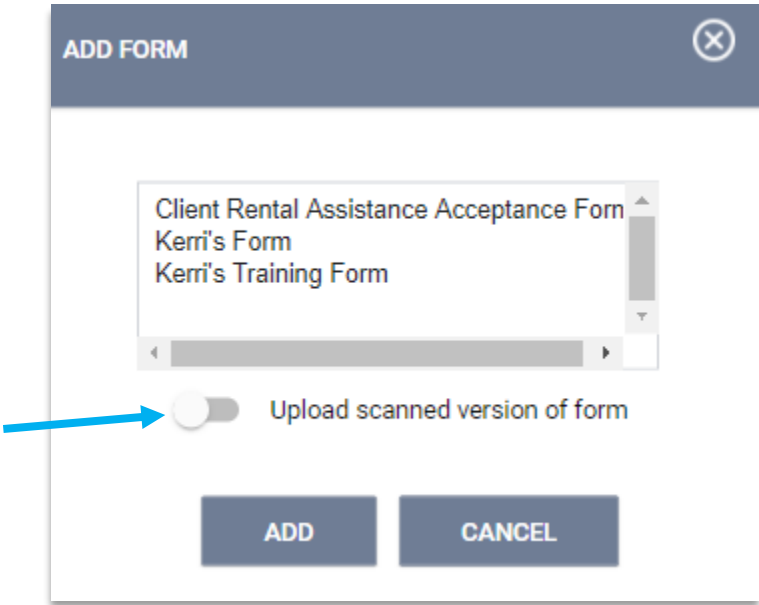
Uploading a Client Form

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.



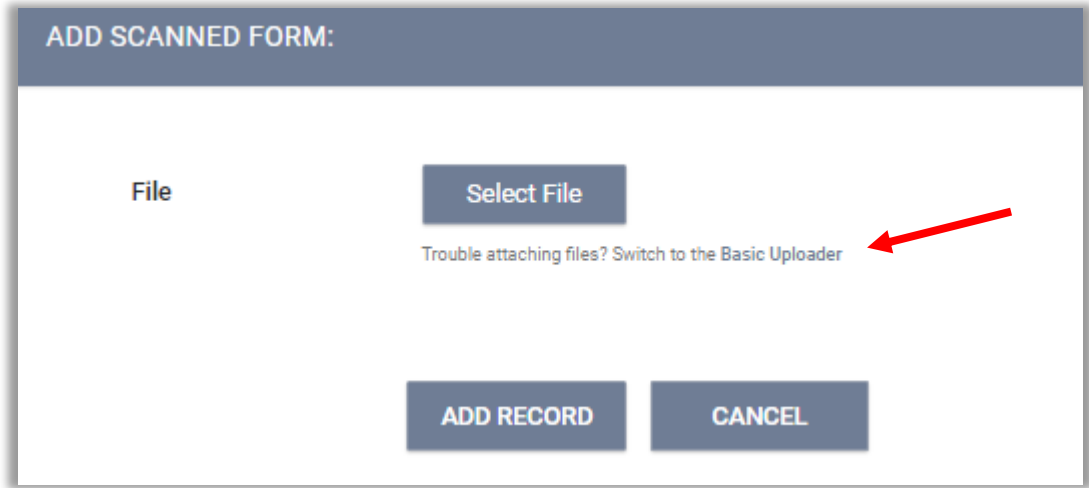
Upload Scanned version of form:

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

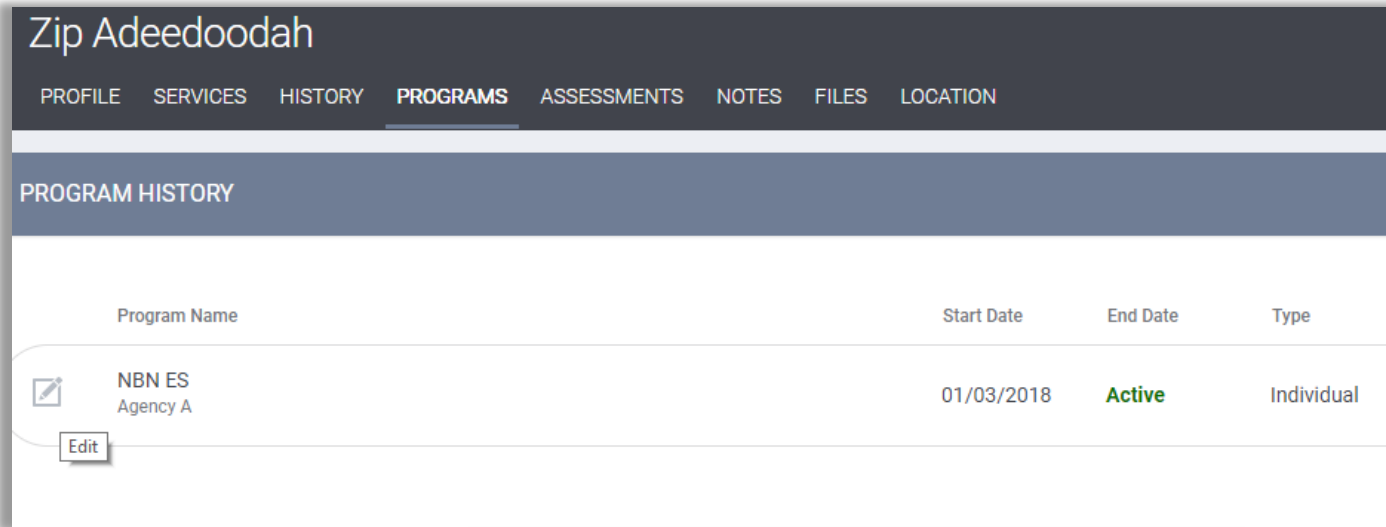
Add Scanned Form page will appear. *Click on* Select File and select your desired file, then click *Add Record*. If your system is not compatible with advanced upload, you can choose the *Basic Uploader* (red).



Reassigning a Case Manager (Assigned Staff)

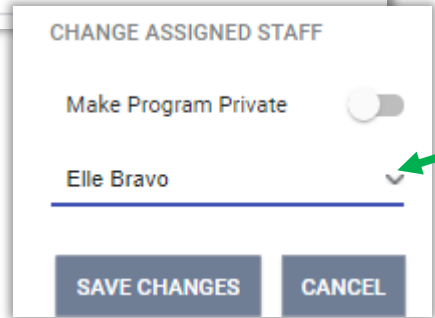
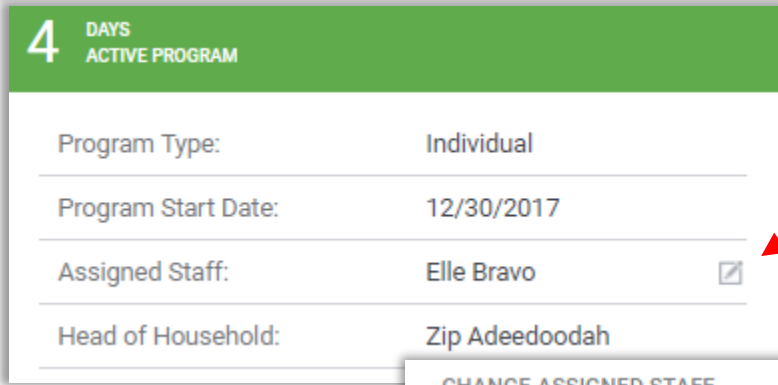
It is by default that Clarity will assign the user who enrolls the client into the Agency Program as the Case Manager (Assigned Staff).

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 sidebar- 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

Zip Adeedoodah | Elle Bravo, Agency A | MC

PROFILE SERVICES **HISTORY** PROGRAMS ASSESSMENTS NOTES FILES LOCATION | SEARCH | CASELOAD

HISTORY

Advanced Search Options Hide ^

Search: _____

Category: Any category | Agency: Any agency


Start Date: ___/___/___ | End Date: ___/___/___


Type: Any type | Clear | **SEARCH**


Service Name	Start Date	End Date
ES NBN Bed Night:Adult Only Bed Agency A	01/03/2018	06/03/2018
Dining Hall:Breakfast Agency A	01/01/2018	04/30/2018
NBN ES Agency A	12/30/2017	Active
Reservation: Motel and Hotel Vouchers:Bed Service Agency A	12/27/2017	12/29/2017


Program
 Service
 Referral
 Reservation
 Assessment


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.

Advanced Search Options View ▾

Service Name	Start Date	End Date
Referral: Kerri's Permanent Supportive Housing System referral to System	11/13/2017	11/13/2017
 Kerri's Permanent Supportive Housing System	11/13/2017	Active 
Dining Hall:Breakfast System	11/13/2017	11/14/2017
Kerri's Awesome Assessment System	11/13/2017	
Bus Pass:One Way System	11/13/2017	11/13/2017  
Job Placement:Job Placement System	11/13/2017	11/13/2017  
Learning Workshop:Resume Writing Class System	11/13/2017	11/13/2017 
Case Management:Individual Session System	11/13/2017	11/13/2017  
Kerri Test Program System	11/10/2017	11/13/2017
Learning Workshop:Life Skills Class System	11/10/2017	11/13/2017 
NBN ES Agency A	07/13/2017	Active
Dining Hall:Breakfast Agency A	07/10/2017	07/16/2017 

 Program
  Service
  Referral
  Reservation
  Assessment

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/>

