

## Clarity HMIS Select Workflow

### Enrolling Clients in Clarity HMIS

1. If client is already in HMIS, make sure that their client profile is up-to-date.
2. If client is not in HMIS after searching for the client by their first name, last name, birth date or social security number, or any combination in the system, click on Add Client and enter the client's information.
3. Go to client's **Programs** tab.
4. Under Programs, click on the correct Program to enroll your client(s).
5. If enrolling the household members, toggle on household members under **Include group members** to include them in the enrollment and click **Enroll**.
6. **Program Entry Date**- A project Entry Date is required to indicate that a client was or being served by a project.

*Street Outreach:* Date of first contact with the client.

*Emergency Shelter:* Night the client first stayed in the shelter. *Night by night* shelters will have a project start date and will allow clients to re-enter as necessary without "exiting" and "restarting" for each stay for a specified period.

*Safe Haven and Transitional Housing:* Date the client moves into the residential project (i.e. first night in residence).

*Permanent Housing, including Rapid Re-Housing:* Date following application that the client was admitted into the project. To be admitted indicates the following factors have been met: 1) Information provided by the client or from the referral indicates they meet the criteria for admission; 2) The client has indicated they want to be housed in this project; 3) The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, or scattered-site subsidy) or expects to have one in a reasonably short amount of time.

*Other Service Projects:* including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

7. Complete Client Program Enrollment.  
Some data fields may already be completed due to cascade enrollment data feature set in Clarity; it allows information to pre-fill client's information based on previous enrollment values within a year. End users still need to make sure that the client's information is accurate and up to date.
  - Emergency Shelter Night-by-night (ES NBN) and Street Outreach (SO) programs: Remember to enter **Date of Engagement** if any.
  - Permanent Housing Project: Remember to record **Housing Move-In Date** to which a client or household moves into a permanent housing unit.

### **Program Status Update/Annual Assessment**

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

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

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

### **Project Exit**

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

*Residential projects:* The last day of continuous stay in the project before the client transfers to another residential project or otherwise stops residing in the project.

*Non-residential projects:* the last day a service was provided or the last date of a period of ongoing service.

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

1. To exit a client and the household, go to the client's program.
2. Click on **x Exit**
3. Toggle on (blue) members of the household who are exiting from the program if needed.
4. Enter the **Project Exit Date**. Each household member may have separate exit dates, destinations, etc.
5. **Destination-** Select the response that most closely matches where your client will be staying after exiting your project.

**Case Manager Smart Path Referral Steps:**

To manage the clients that are referred and assigned to you.

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

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

**HMIS Data Standards Manual:** provides a review of all Universal Data Elements, Project Descriptor Data Elements, and Common Program Specific Data Elements. It contains information on data collection requirements, instructions for data collection, and descriptions that the HMIS User will find as a reference.

<https://www.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf>

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

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