



Homeless Management Information System

Santa Cruz County Continuum of Care

2019

Clarity HMIS workflow Adding New Clients

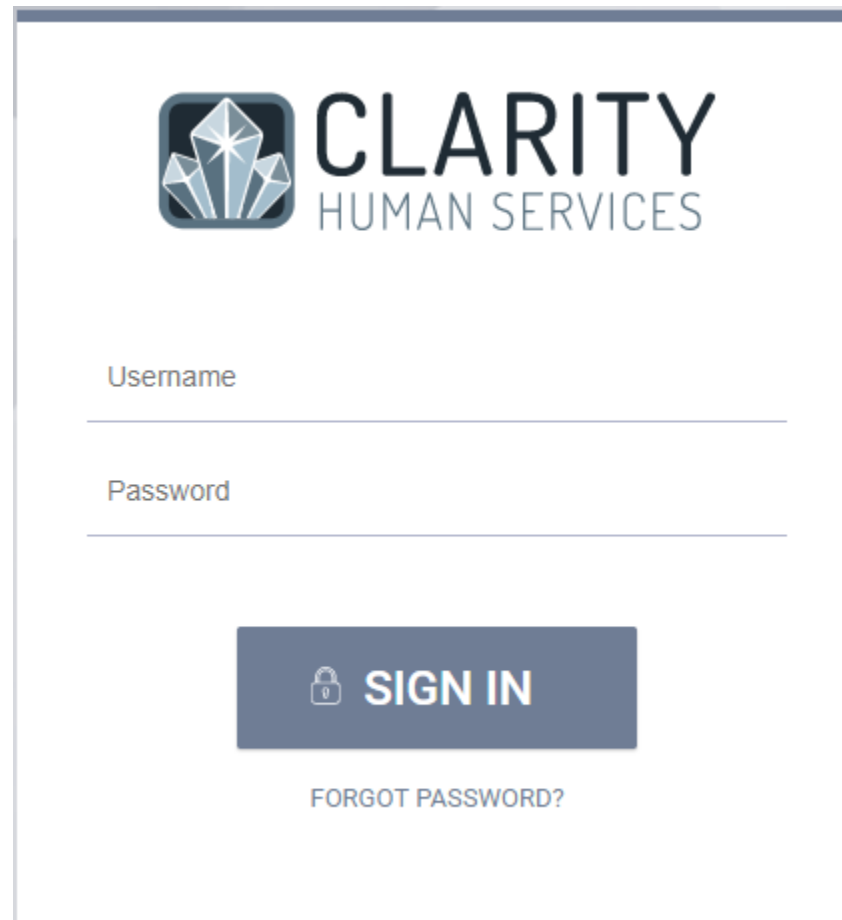


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Access HMIS Web Portal

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).



The image shows a login portal for Clarity Human Services. At the top, there is a logo consisting of a blue square with white geometric shapes inside, followed by the word "CLARITY" in large, bold, black capital letters, and "HUMAN SERVICES" in smaller, blue capital letters below it. Below the logo, there are two input fields: "Username" and "Password", each with a horizontal line for text entry. Below these fields is a large, dark blue rectangular button with a white padlock icon and the text "SIGN IN" in white capital letters. Below the button, there is a link that says "FORGOT PASSWORD?" in blue capital letters.

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.




CLARITY
HUMAN SERVICES

Your IP address: !

Your email

☐ I'm not a robot


reCAPTCHA
[Privacy](#) - [Terms](#)

RESET PASSWORD

[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).

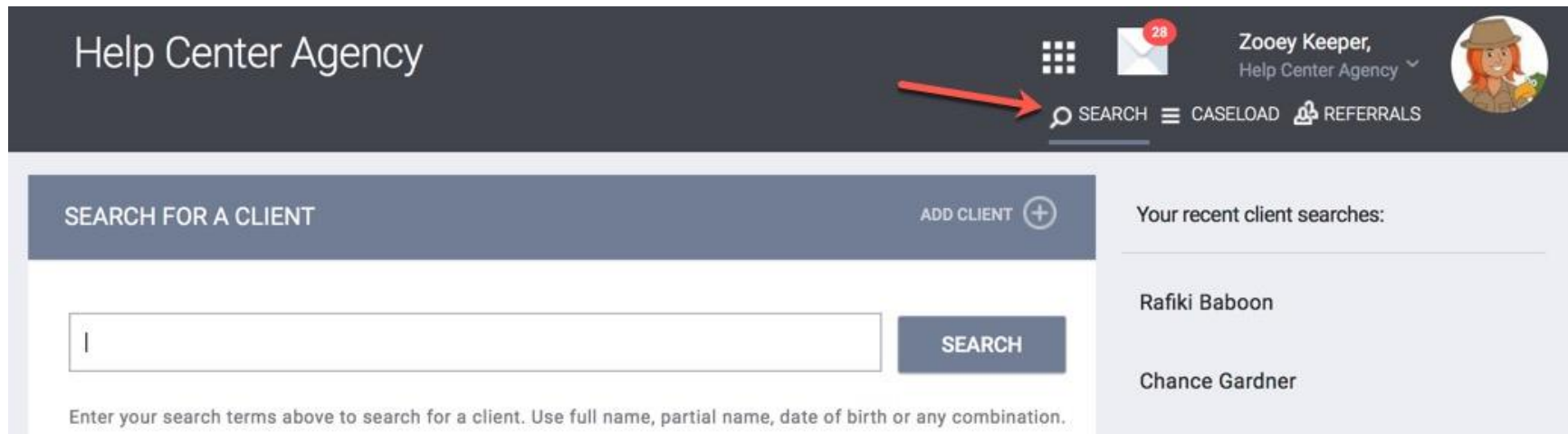
Search for Clients

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*.



The screenshot displays the 'Help Center Agency' dashboard. At the top, a dark navigation bar contains the agency name, a grid icon, a mail icon with a '28' badge, the user's name 'Zooney Keeper, Help Center Agency' with a dropdown arrow, and a profile picture. Below the navigation bar, a red arrow points to the 'SEARCH' tab, which is part of a group including 'CASELOAD' and 'REFERRALS'. The main content area is divided into two sections. The left section, titled 'SEARCH FOR A CLIENT', features a text input field with a cursor, a 'SEARCH' button, and an 'ADD CLIENT' button with a plus icon. Below the input field, a note reads: 'Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.' The right section, titled 'Your recent client searches:', lists two entries: 'Rafiki Baboon' and 'Chance Gardner'.

Help Center Agency

28

Zooney Keeper,
Help Center Agency

SEARCH CASELOAD REFERRALS

SEARCH FOR A CLIENT

ADD CLIENT +

|

SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Your recent client searches:

Rafiki Baboon

Chance Gardner

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
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	

Last Updated

03/20/18





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

Manage

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.

The screenshot displays a web application interface for searching clients. At the top, a dark blue header bar contains the text "SEARCH FOR A CLIENT" on the left and "ADD CLIENT" with a plus icon on the right. Below the header, there is a search input field containing the text "John 8089". To the right of the input field is a dark blue button labeled "SEARCH". Below the input field, a dropdown menu is open, showing a single result: "John Doe" with a date "09/29/1989" and the number "8089". A mouse cursor is pointing at the "John Doe" entry. To the right of the search results, there is a section titled "Your recent client searches:" which lists three entries: "Mufasa Lion", "Rafiki Baboon", and "Chenopod".

SEARCH FOR A CLIENT		ADD CLIENT (+)
<input type="text" value="John 8089"/>		SEARCH
<div>John Doe 09/29/1989 8089</div>		

or any combination.

Your recent client searches:

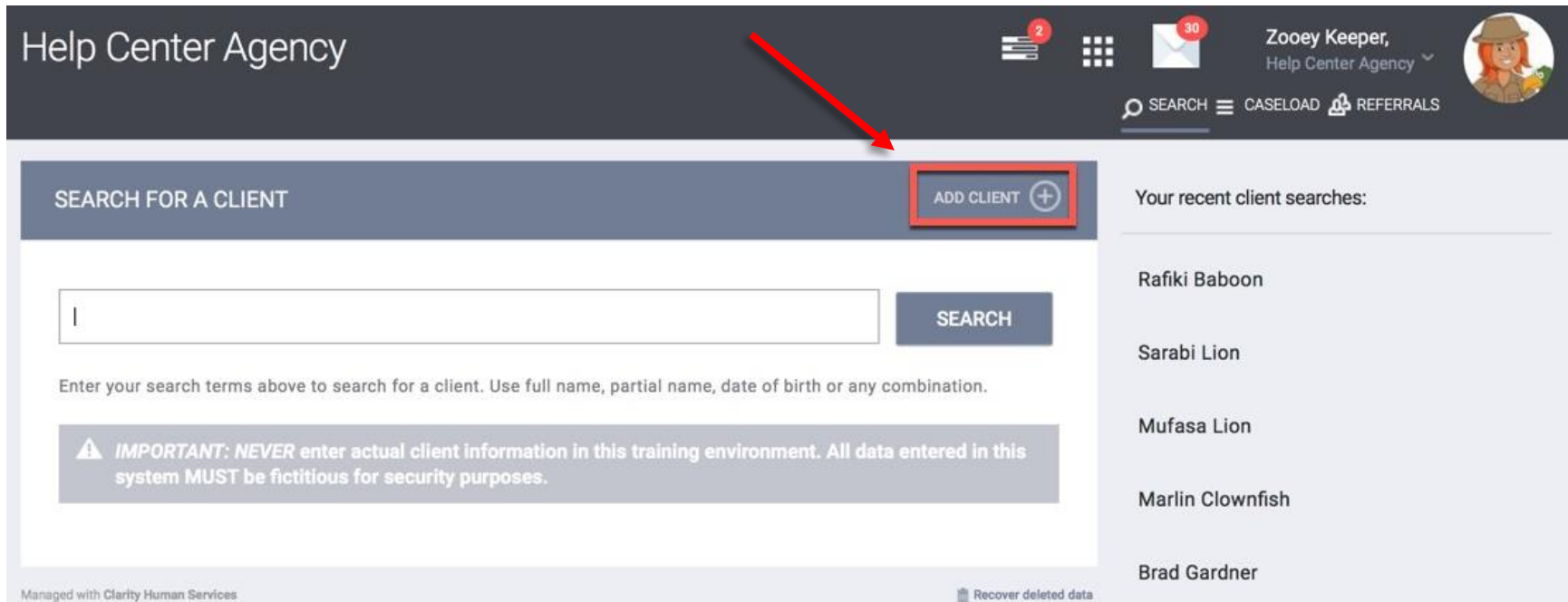
- Mufasa Lion
- Rafiki Baboon
- Chenopod

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 [\(49\)](#).



The screenshot displays the 'Help Center Agency' interface. At the top, a dark navigation bar contains the agency name, user profile for 'Zooney Keeper', and navigation links for 'SEARCH', 'CASELOAD', and 'REFERRALS'. A red arrow points from the top bar to the 'ADD CLIENT' button, which is highlighted with a red box. Below the navigation bar is a search section with the heading 'SEARCH FOR A CLIENT'. It includes a search input field with a single character 'I', a 'SEARCH' button, and a red 'ADD CLIENT' button with a plus icon. A warning message states: 'IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this system MUST be fictitious for security purposes.' On the right side, a list titled 'Your recent client searches:' shows entries: 'Rafiki Baboon', 'Sarabi Lion', 'Mufasa Lion', 'Marlin Clownfish', and 'Brad Gardner'. The footer includes 'Managed with Clarity Human Services' and a 'Recover deleted data' link.

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. Note, this is not a required field unless the program is under SSVF funding.

CREATE A NEW CLIENT

Social Security Number	- - -
Quality of SSN	Select ▼
Last Name	
First Name	
Quality of Name	Select ▼
Quality of DOB	Select ▼
Date of Birth	01/01/1980 Adult. Age: 38
Middle Name	None ▼
Alias	
Gender	Select ▼
Race	Select ▼
Ethnicity	Select ▼
Disabling Condition	Select ▼
Veteran Status	Select ▼
Primary Phone Number	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.

Help Center Agency

Zoey Keeper,
Help Center Agency

SEARCH

CASELOAD

REFERRALS

CREATE A NEW CLIENT

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

Please fill in Release of Information form

CANCEL

RELEASE OF INFORMATION

Permission

Yes

Start Date

11/03/2017

End Date

11/03/2022

Documentation

Select

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.

RELEASE OF INFORMATION	
Permission	Yes
Start Date	11/03/2017
End Date	11/03/2022
Documentation	Select

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.

The screenshot displays the 'Daffy Duck' client profile in a web application. The top navigation bar includes the client's name, a menu, a grid icon, a mail icon with a '31' badge, the user 'Zoey Keeper, Help Center Agency', and a profile picture. Below the navigation bar is a tabbed interface with 'PROFILE' selected. The main content area is divided into two sections. The left section, titled 'CLIENT PROFILE', contains a form with the following fields: 'Social Security Number' (XXX - XX - 0459), 'Quality of SSN' (Full SSN Reported), 'Last Name' (Duck), 'First Name' (Daffy), and 'Quality of Name' (Full name reported). To the right of the form is a placeholder for a profile picture and a 'UNIQUE IDENTIFIER' (FAD1B36C1). The right section, titled 'Household Members', features a 'Manage' button highlighted with a red rectangle. Below the button, it states 'No active members'.

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

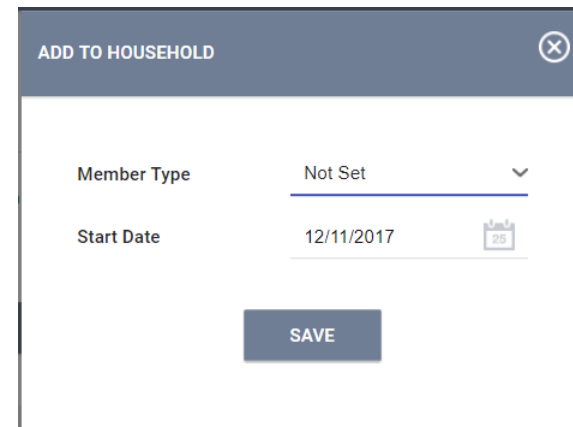
[Manage](#)


No active members

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.

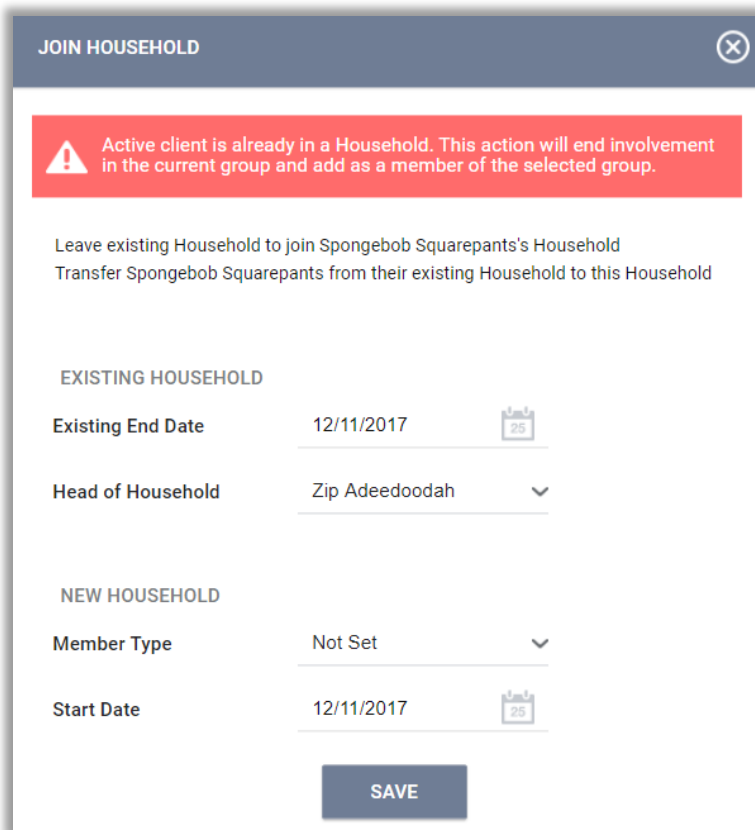


Join  option are clients that are already a member of a different household.

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).


The screenshot displays the 'Pumba Warthog' client profile. The top navigation bar includes links for PROFILE, HISTORY, PROGRAMS, SERVICES, ASSESSMENTS, NOTES, REFERRALS, LOCATION, and FILES. The user 'Zooey Keeper, Help Center Agency' is logged in. The 'HOUSEHOLD MANAGEMENT' section features a search bar with 'rafiki' entered and a 'SEARCH' button (indicated by a blue arrow). Below the search bar, a table lists household members. The first entry, 'Rafiki Baboon', is highlighted with a green arrow pointing to the 'Join' button. The table also shows the date of birth, last four SSN, and last updated date. A 'BACK' button is at the bottom. The 'Household Members' section on the right lists 'Pumba Warthog' as 'Other ★' (indicated by a red arrow) and 'Timon Meercat' as 'Other'. Below this, a section titled 'Your recent client searches accessed:' lists several clients and their IDs.

Client	Date of Birth	Last Four SSN	Last Updated
Rafiki Baboon Existing Group. Head of Household: Mufasa Lion . Members: 6	03/09/00	1111	08/28/17

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


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: 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.

Zip Adeedoodah

PROFILE SERVICES HISTORY PROGRAMS ASSESSMENTS NOTES FILES LOCATION

Elle Bravo,
Agency A

MC

SEARCH CASELOAD

CLIENT PROFILE

Social Security Number

XXX - XX - 1111

Quality of SSN

Full SSN Reported

Last Name

Adeedoodah

First Name

Zip

Quality of Name

Full name reported

Quality of DOB

Full DOB Reported

Date of Birth

01/01/2010

Child. Age: 8

UNIQUE IDENTIFIER

7E63C28C2

SAVE CHANGES

CANCEL

Household Members

Manage

Michael Jackson

Father

Prince Charming

Grandparent

Cat Hat

Wife

Active Services

ES NBN Bed Night:Adult Only Bed

Dining Hall:Breakfast

Active Programs

NBN ES

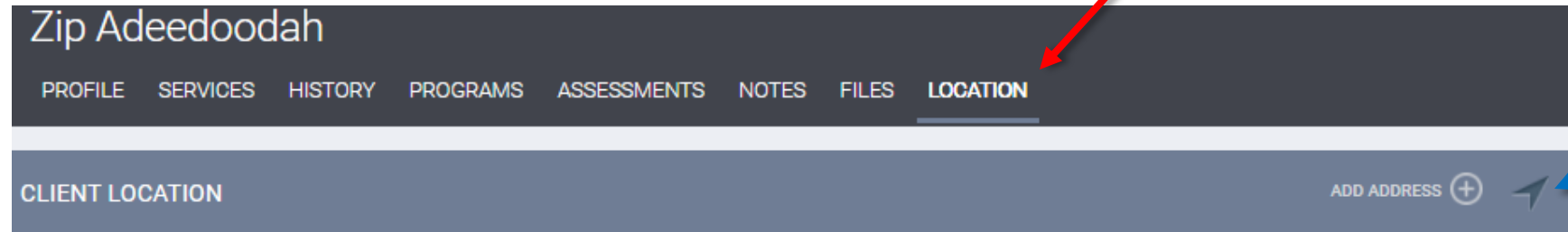
Assigned Staff 1

MC


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

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**

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.

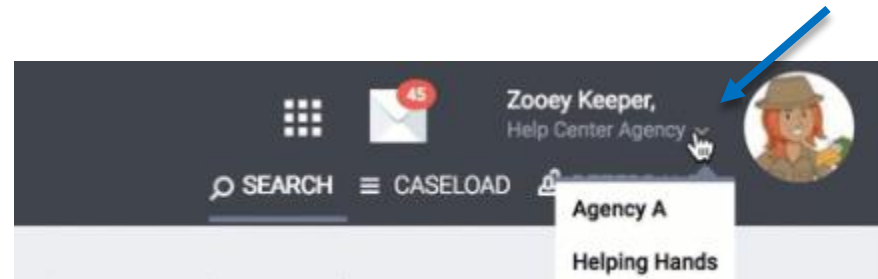
The screenshot shows the 'Zip Adeedoodah' application interface. At the top, there's a navigation bar with tabs: PROFILE, SERVICES, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, and LOCATION (which is currently selected). Below this is a header for 'CLIENT LOCATION' with an 'ADD ADDRESS' button and a location pin icon. The main area is a Google Map of Santa Cruz, CA, in satellite view. A blue pin is located in the downtown area, and a red pin is located on the coast near Seabright State Beach. At the bottom, there's a table with two columns: 'Address' and 'Date'. The first row shows 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

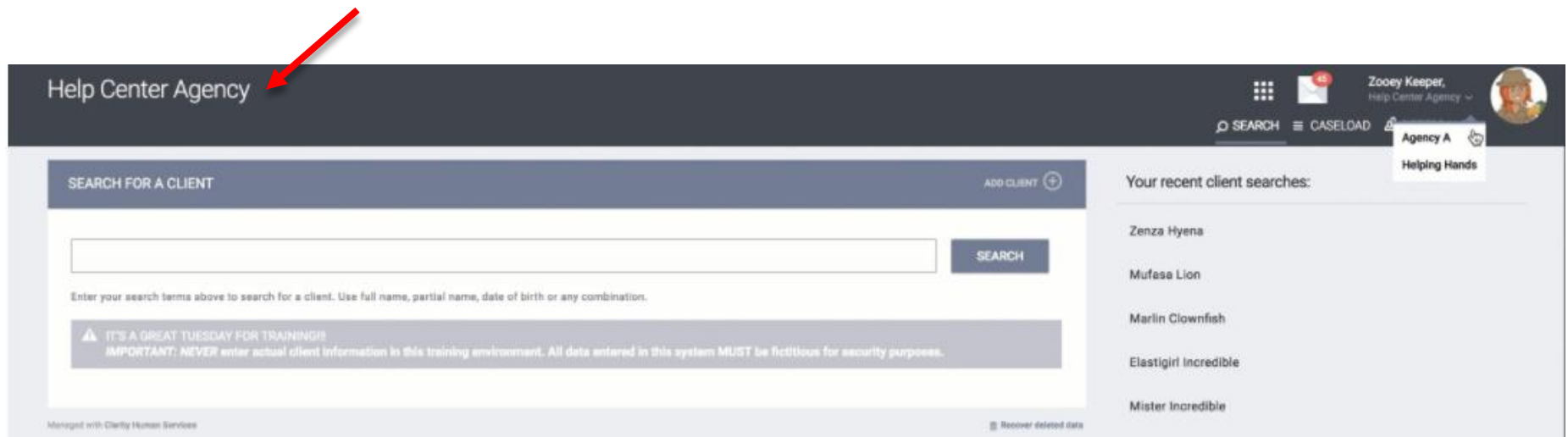
Switching Agencies

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).



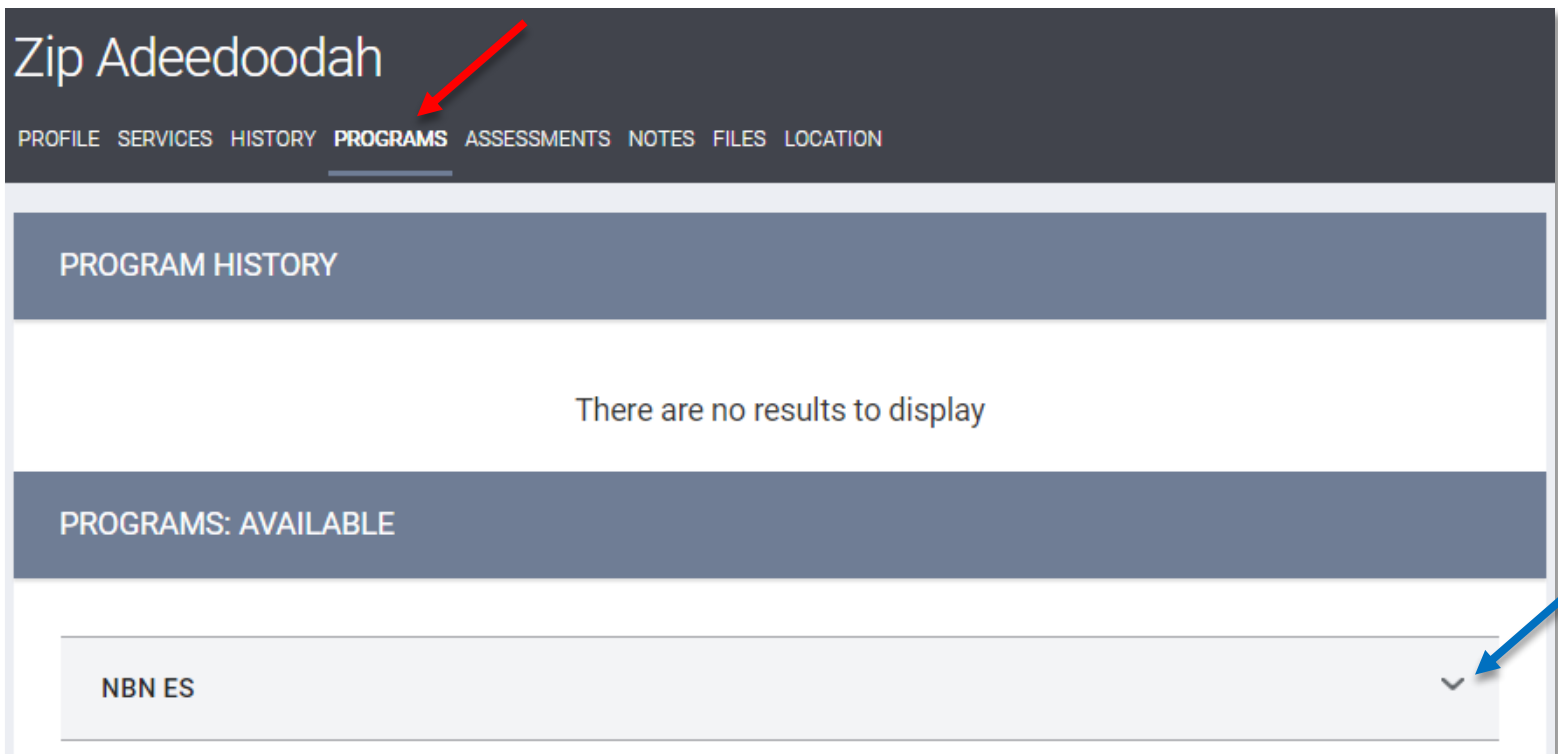
Program Based Transaction

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.

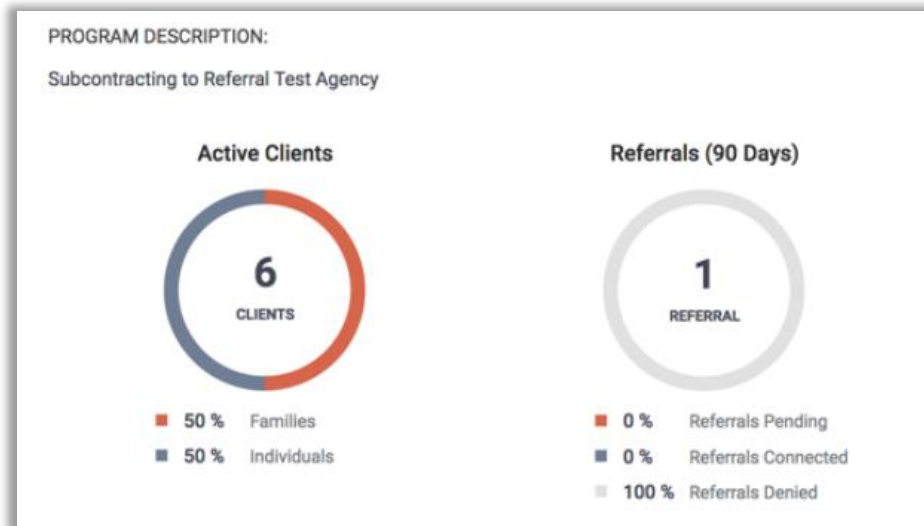
Programs: Available- Lists current programs provided by your agency that are available for client enrollment.


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

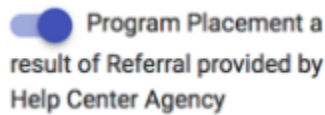
☒ Simba Lion

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.

The screenshot shows the 'Enroll Program for client Rafiki Baboon' form. The form is divided into several sections with dropdown menus for selection. The 'Project Start Date' has a calendar icon. The 'Relationship to Head of Household' is a dropdown menu. The 'DISABLING CONDITIONS AND BARRIERS' section includes dropdowns for 'Disabling Condition', 'Physical Disability', 'Developmental Disability', 'Chronic Health Condition', 'HIV - AIDS', 'Mental Health Problem', and 'Substance Abuse Problem'. The 'HEALTH INSURANCE' section includes a dropdown for 'Covered by Health Insurance'. At the bottom, there are two buttons: 'SAVE & NEXT' (highlighted with a red box) and 'CANCEL'. On the right side, there is a sidebar titled 'ENROLLING PROGRAM' with fields for 'Program Type' (Group (2)), 'Assigned Staff' (checked), and 'Head of Household'. Below this is a section titled 'Program Group Members' (highlighted with a red box) listing 'Nala Lioness'. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'SERVICES', 'ASSESSMENTS', 'NOTES', 'REFERRALS', 'LOCATION', and 'FILES'. The user 'Zooley Keeper, Help Center Agency' is logged in.

Rafiki Baboon

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES REFERRALS LOCATION FILES

SEARCH CASELOAD Zooley Keeper, Help Center Agency

Enroll Program for client Rafiki Baboon

Project Start Date

Relationship to Head of Household Select

DISABLING CONDITIONS AND BARRIERS

Disabling Condition Select

Physical Disability Select

Developmental Disability Select

Chronic Health Condition Select

HIV - AIDS Select

Mental Health Problem Select

Substance Abuse Problem Select

HEALTH INSURANCE

Covered by Health Insurance Select

SAVE & NEXT CANCEL

ENROLLING PROGRAM

Program Type: Group (2)

Assigned Staff: ☒

Head of Household:

Program Group Members

Nala Lioness

Audit Log

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 Alcohol ▼ 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

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.

Program Enrollment- Permanent Housing


If client is enrolled in Permanent Housing Project, remember to record **Housing Move-In Date** (*red*) to which a client or household moves into a permanent housing unit.


The screenshot shows a web application interface for enrolling a client named Mickey Mouse into a Permanent Housing program. The interface has a dark header with the client's name and a navigation bar with tabs: PROFILE, HISTORY, PROGRAMS (selected), ASSESSMENTS, NOTES, FILES, and LOCATION. The main content area is titled 'Enroll Program for client Mickey Mouse'. It contains several form fields: 'Project Start Date' with a value of 03/14/2019 and a calendar icon; two dropdown menus for 'Is the Client an Adult or Head of Household?' and 'Is the Program Type a Permanent Housing Program Type?', both set to 'Yes (Automatically Generated Response)'; a section header 'COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT'; a 'Housing Move-In Date' field with a calendar icon and a red arrow pointing to it; and a 'LIVING SITUATION' section with fields for 'Prior Street Address', 'Prior City', and 'Zip Code of Last Address', each followed by a 'Prior Address Data Quality' dropdown menu set to 'Select'.


Mickey Mouse

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION



Enroll Program for client Mickey Mouse

Project Start Date 03/14/2019 


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


Is the Program Type a Permanent Housing Program Type? Yes (Automatically Generated Response) 

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

Housing Move-In Date  

LIVING SITUATION

Prior Street Address Prior Address Data Quality Select 

Prior City Prior State Select 

Zip Code of Last Address

Program Enrollment - Date of Engagement

If client is being enrolled in Emergency Shelter Night-by-night (ES NBN) and Street Outreach (SO) programs, please remember to enter the **Date of Engagement** (*red*). The date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.


Mickey Mouse

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION

Enroll Program for client Mickey Mouse

Project Start Date

03/14/2019



Is the Client an Adult or Head of Household?

Yes (Automatically Generated Response)

▼

Is the Program Type Either Emergency Shelter, Safe Haven, or Street Outreach?

Yes (Automatically Generated Response)

▼

Is the Program Type Either Street Outreach or a Night-by-Night Emergency Shelter?


Yes (Automatically Generated Response)


▼

COMPLETE DATE OF ENGAGEMENT WHEN CLIENT HAS BEEN ENGAGED

Date of Engagement

__/__/__





LIVING SITUATION

Prior Street Address

Prior Address Data Quality

Select

▼

Program Enrollment- Services

After enrolling the client into the program, it automatically directs you to *Provide Services* (red).

To handle each service transaction component, go to:

Basic Service Transactions see [page 31](#)

Transactions with Expense see [page 32](#)

Time Based Transactions see [page 33](#)


Reservation Management Transactions see [page 34](#)

*Note that the tabs
under the Client's
name are connected to
the client profile

The tabs in the
Program are
associated with the
actual Program
Enrollment.

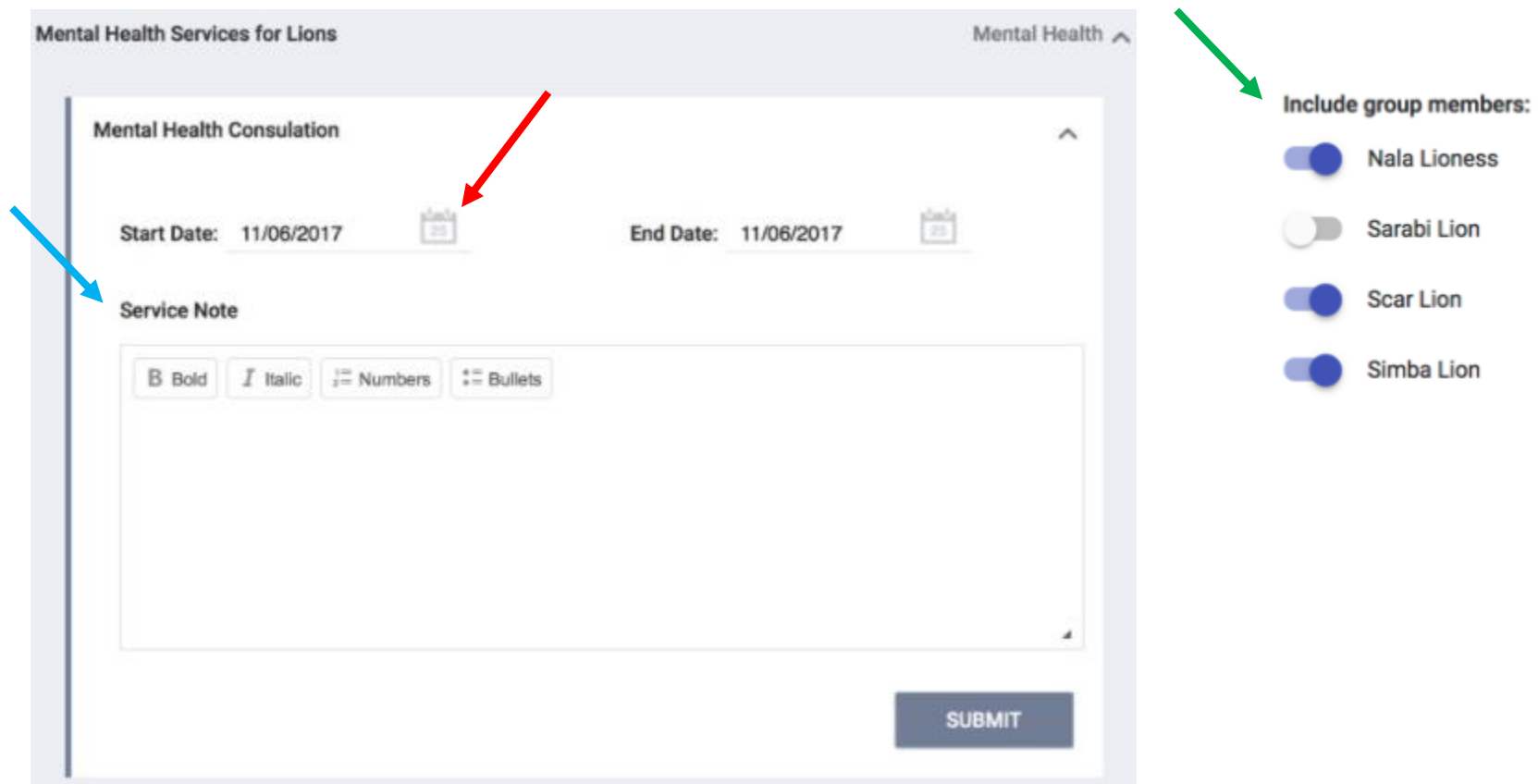
The screenshot displays the 'Big Bird' software interface. At the top, a dark header bar contains the title 'Big Bird' and a series of navigation tabs: PROFILE, SERVICES, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, and LOCATION. The 'PROGRAMS' tab is currently selected. Below this header, a blue banner displays the text 'PROGRAM: KERRI'S SERVICE ONLY TRAINING PROGRAM'. Underneath the banner is a row of program-specific tabs: Enrollment, History, Provide Services, Assessments, Notes, Files, and Forms. The 'Provide Services' tab is highlighted with a red underline and a red arrow points to it from the text 'it automatically directs you to Provide Services (red)'. To the right of these tabs is an 'Exit' button with a close icon. Below the tabs, the main content area is titled 'Services' and contains a list of service items. The first item is 'Bus Pass' with a dropdown menu showing 'Transportation'. The second item is 'Case Management' with a dropdown menu showing 'Case Management'.

Basic Service Transaction

In a Basic Service Transaction, the only required fields are Start Date and End Date. By default, these services provide one day of service on the date that the transaction is documented; you can alter the dates by clicking the calendar icon  (red)

Service note (blue)- An optional tool to make notes about the service given. (e.g. “Had a successful consultation with client.”)

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



The screenshot shows a web form titled "Mental Health Services for Lions" with a sub-header "Mental Health Consultation". The form includes fields for "Start Date" and "End Date", both set to "11/06/2017", each with a calendar icon. A "Service Note" section contains a text area with formatting options: Bold, Italic, Numbers, and Bullets. A "SUBMIT" button is at the bottom right. To the right of the form is a section titled "Include group members:" with four toggle switches for "Nala Lioness", "Sarabi Lion", "Scar Lion", and "Simba Lion".

Annotations:

- A blue arrow points to the "Service Note" text area.
- A red arrow points to the calendar icon next to the "Start Date" field.
- A green arrow points to the "Include group members:" section.

Transaction with Expense

Some services will be accompanied with an expense amount. In this scenario, you are requested to provide an *Expense Amount*, *Expense Date*, and *Funding Source*.

- **Expense Amount** - Depending on the setup of the service, this may be either an adjustable or a pre-determined amount that cannot be modified.
- **Expense Date** - The date the expense was issued.
- **Funding Source** - Depending on the setup of the service, this may be adjustable, or automatically set to a pre-determined funding source.

Case Management for Lions

Housing ^

Case Management

Start Date: 11/06/2017

End Date: 11/06/2017

Expense Amount: 10.00

Expense Date: 11/06/2017

Funding Source

- Do Not Charge
- ✓ No Funding Source
- Private Funding
- Funding Source 1
- Funding Source 2
- Funding Source 3



Service Note

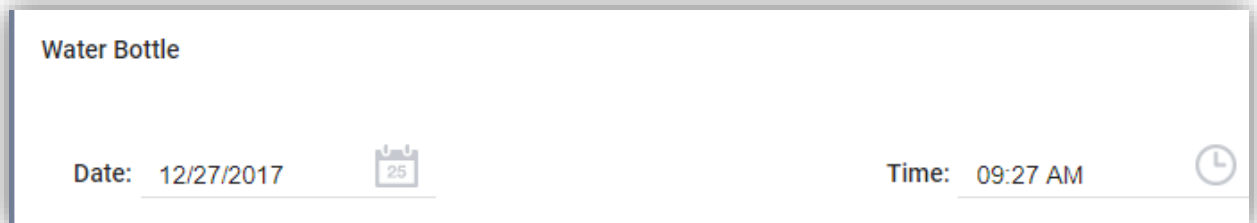
B Bold I Italic N Numbers B Bullets

SUBMIT



Time Based and Time Tracking

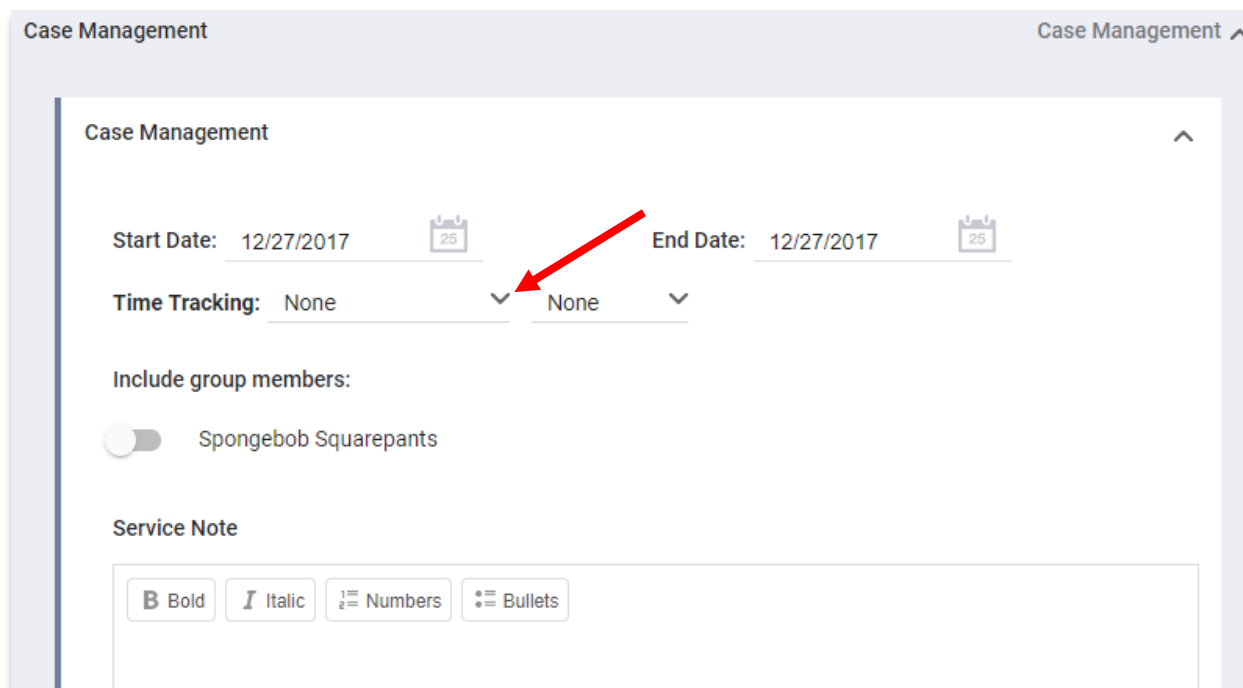
Service Transactions that occurs more than once a day can be time-based.

When you select a service, the current date and time will be displayed; this can be adjusted if the service is on a different date or time by clicking on the  calendar icon and the clock  icon.





Water Bottle



Date: 12/27/2017  Time: 09:27 AM 



Case Management

Case Management



Start Date: 12/27/2017  End Date: 12/27/2017 


Time Tracking: None  None 

Include group members:

☐ Spongebob Squarepants

Service Note

B Bold *I* Italic  Numbers  Bullets

A function with time tracking like in the *Case Management* service allows you to keep track of how much time you have spent on a service. Simply enter how much time you have spent on the service by clicking the drop down  icon (red) and select by the hour; the minutes are in increments of 15.

Reservation Management

Some daily attendance has Reservation Management functionality, (i.e. Bed Services), that can be made directly from the Service screen.

To make reservation for the client:

Enter the start date and the reservation day(s) (red) for the client.

There is also the option to include any member of the family by clicking the toggle (blue) next to the group member's name.

Click on *Preview Reservation* (green). This will prompt the dates that can be reserved. Click the drop down icon and the available slots will be displayed. Choose the available slots, different slot # are given for each member of the family if group members are included.

Click *Confirm* on each of the member reservation (orange) and a message of: *Reservation is successfully done!* will appear.

Motel and Hotel Vouchers

Bed Service

Start Date: 12/27/2017

Days to Reserve: 3

Include group members:

- ☒ Michael Jackson
- ☒ Zip Adeedoodah

PREVIEW RESERVATION

Prince Charming

Dec 27, 2017	Slot #2	▼
Dec 28, 2017	Slot #2	▼
Dec 29, 2017	Slot #2	▼

Michael Jackson

Dec 27, 2017	Slot #3	▼
Dec 28, 2017	Slot #3	▼
Dec 29, 2017	Slot #3	▼

CONFIRM

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, as the Eligibility Engine must be turned on for the assessment to determine eligibility.

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).

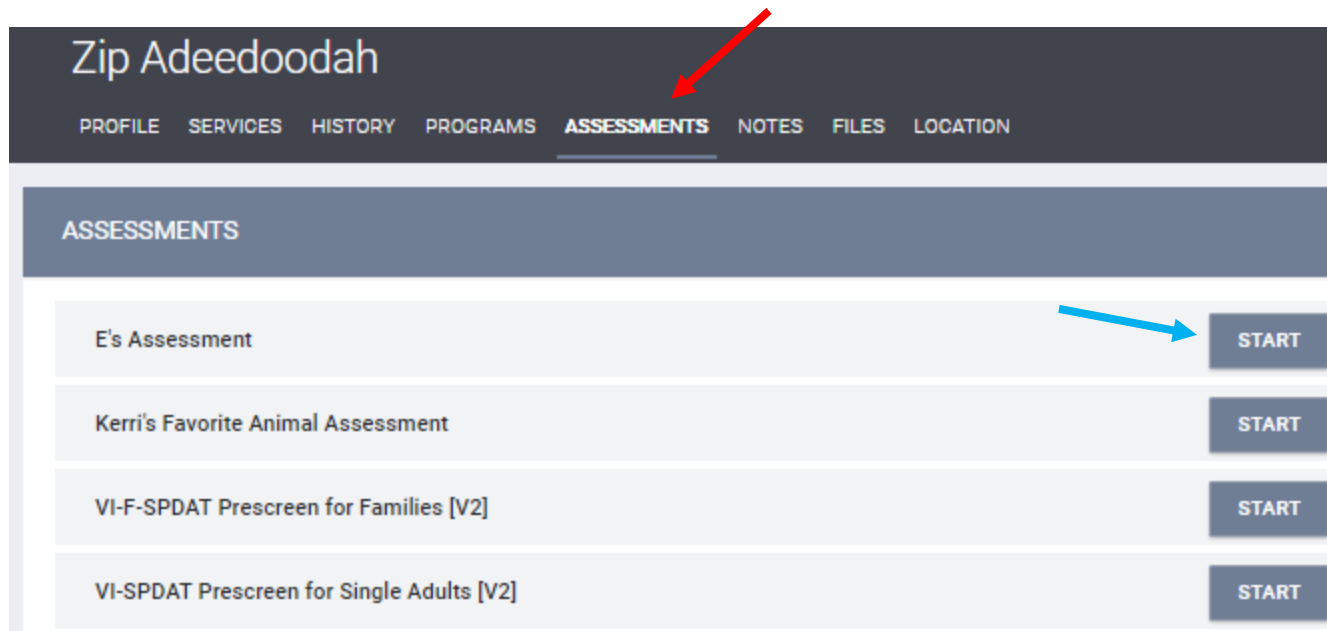
The screenshot shows the 'Big Bird' client management interface. The top navigation bar includes the client name 'Big Bird', a grid icon, an email icon, the user 'Elle Bravo, Agency A', and an 'MC' logo. Below the navigation bar is a menu with options: PROFILE, SERVICES, HISTORY, PROGRAMS, ASSESSMENTS (highlighted), NOTES, FILES, LOCATION, and REFERRALS. To the right of the menu are search and case load icons. The main content area is titled 'ASSESSMENTS' and lists six assessments, each with a 'START' button:

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

Below the assessments list is a section titled 'ASSESSMENT HISTORY', which is highlighted with a red arrow pointing to it from the left.

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**).



The screenshot shows the client record for Zip Adeedoodah. The top navigation bar includes tabs for PROFILE, SERVICES, HISTORY, PROGRAMS, **ASSESSMENTS** (highlighted with a red arrow), NOTES, FILES, and LOCATION. Below the navigation bar, the ASSESSMENTS section is displayed. It contains a list of four assessments, each with a corresponding START button (highlighted with a blue arrow for the first one):

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

Community Queue-Program Eligibility Determination

After completing the assessment, click on

REFER DIRECTLY TO COMMUNITY QUEUE (red).

You may have to scroll down the page past eligible and ineligible programs to find the button.

PROGRAM ELIGIBILITY DETERMINATION

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	0	RISKS	0
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	1
VI-SPDAT-V2 PRE-SCREEN TOTAL		4	

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

Community Programs

Kerri's Permanent Supportive Housing SystemPH - PERMANENT SUPPORTIVE HOUSING (...)

Kerri Test Program SystemSERVICES ONLY

Kerri's Service Only Training ProgramKerri's Test AgencySERVICES ONLY

INELIGIBLE PROGRAMS

REFER DIRECTLY TO COMMUNITY QUEUE**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: ☐

Formatting: B Bold, I Italic, Numbers, Bullets

SEND REFERRAL CANCEL

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**).

The screenshot shows the client record for Zip Adeedoodah. The Programs tab is selected. The program history table shows the NBN ES program. The Edit icon is highlighted. The program edit screen shows the NBN ES program with the Exit button highlighted.

Program Name	Start Date	End Date	Type
NBN ES Agency A	12/30/2017	Active	Group

PROGRAM: NBN ES

Enrollment History Provide Services Forms

Program Service History

Service Name	Start Date	End Date
Basic Needs:Food Agency A	02/20/2018	02/27/2018

SELECT CLIENTS TO EXIT FROM PROGRAM

☒ Zip Adeedoodah Nephew

☐ Cat Hat Wife



END PROGRAM

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.

Exiting a Client from a Program-Open Services

If the client is scheduled for services that will occur after the program exit date, then these services will appear at the bottom of the Exit Program screen where you can conveniently close them by changing the end date (red) to the exit date. Click on Save & Next if exiting a household. Click

OPEN SERVICES

Service Name	Start Date	End Date	Change End Date
Dining Hall:Breakfast Agency A	01/16/2018	02/28/2018	02/28/2018 
Reservation: Motel and Hotel Vouchers:Bed Service Agency A	01/24/2018	01/30/2018	01/30/2018 

SAVE & NEXT

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**).

The screenshot shows the Spring Love client record interface. The top navigation bar includes the client name "Spring Love", a red arrow pointing to the "PROGRAMS" tab, and user information "Elle Bravo, Agency A" with a profile icon "MB". The main content area is divided into two sections: "PROGRAM HISTORY" and "PROGRAMS: AVAILABLE".

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

A blue arrow points to the edit icon (pencil) next to "Kerri's Program A", which has an "Edit" button below it.

PROGRAMS: AVAILABLE

NBN ES

Household Members [Manage](#)

Household Member	Relationship
Spring Kid	Daughter

Active Services

ES NBN Bed Night:Adult Only Bed


Active Programs

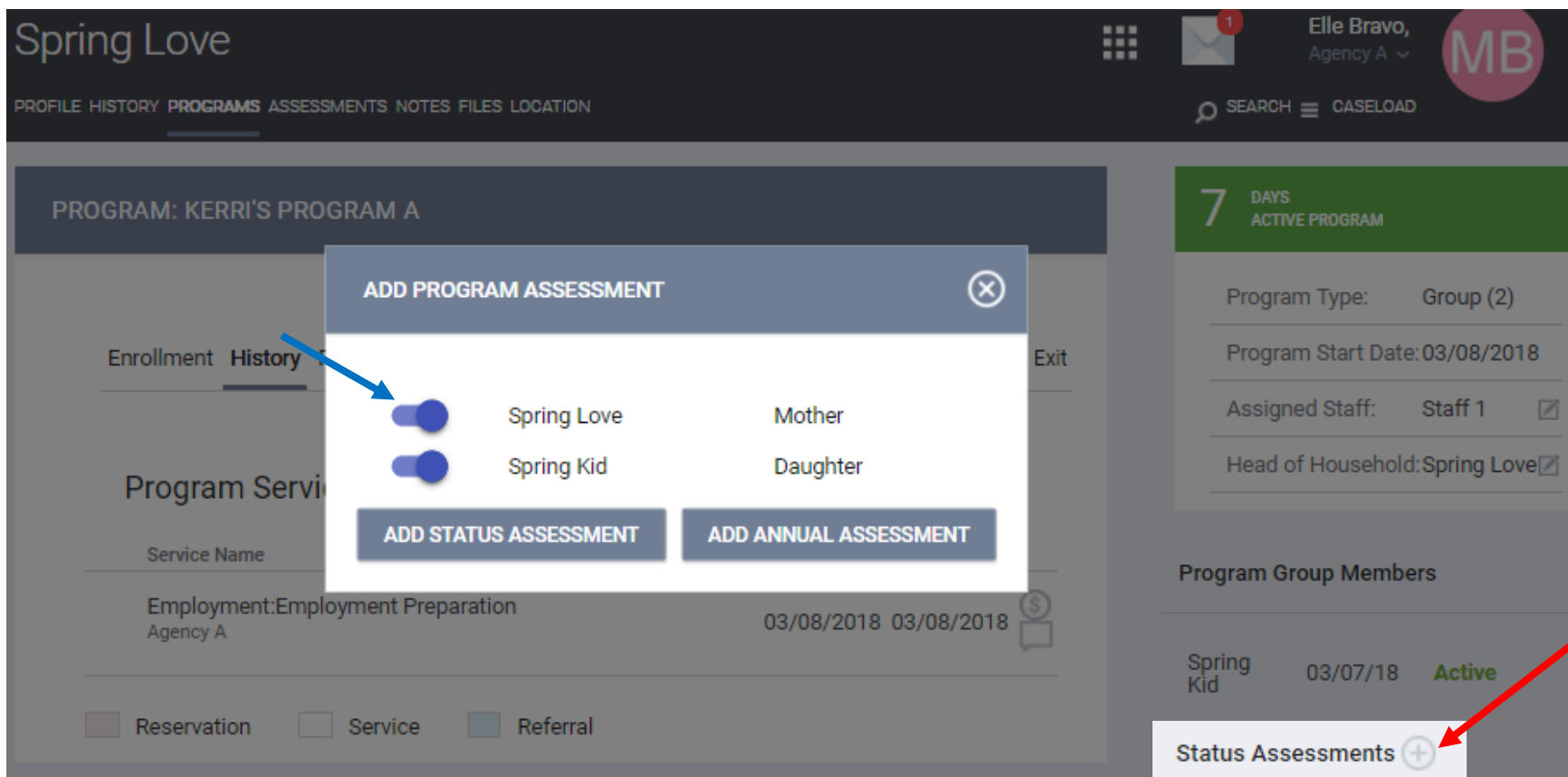
Kerri's Program A

NSEW Program

Managed with Clarity Human Services

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*. This is a convenient way to conduct the status assessment for all selected group members without having to go to each client record separately. After completing the assessment, click *Save and Next* if conducting group assessment, after each member's assessment is complete click *Save and Close*.




The screenshot displays the Spring Love software interface. The main header shows the logo and navigation tabs: PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, and LOCATION. The user is logged in as Elle Bravo, Agency A. The main content area shows the 'PROGRAM: KERRI'S PROGRAM A' with tabs for Enrollment, History, and Program Services. A modal window titled 'ADD PROGRAM ASSESSMENT' is open, showing a list of members with toggle switches. A blue arrow points to the 'Spring Love' toggle, and another blue arrow points to the 'ADD STATUS ASSESSMENT' button. The right sidebar shows program details and a 'Status Assessments' button with a red plus icon, which is highlighted by a red arrow.

ADD PROGRAM ASSESSMENT

Member	Relationship	Assessment Type
Spring Love	Mother	<input checked="" type="checkbox"/> ADD STATUS ASSESSMENT
Spring Kid	Daughter	<input checked="" type="checkbox"/> ADD ANNUAL ASSESSMENT

Program Group Members

Member	Date	Status
Spring Kid	03/07/18	Active

Status Assessments 

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. This will only conduct an assessment on the current client selected (orange).

The screenshot displays the 'Spring Love' client management interface. The top navigation bar includes tabs for PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, and LOCATION. The 'ASSESSMENTS' tab is highlighted with a red arrow. Below the navigation bar, the main content area shows 'PROGRAM: KERRI'S PROGRAM A' and a sub-tabbed interface with 'Assessments' selected. A list of assessments is shown, including 'Status Update Assessment', 'Annual Assessment', 'Kerri's Awesome Assessment', and 'Kerri's Favorite Animal Assessment'. Each assessment has a 'START' button next to it. A blue arrow points to the 'START' button for the 'Status Update Assessment'. On the right side, a sidebar displays program details: '7 DAYS ACTIVE PROGRAM', 'Program Type: Group (2)', 'Program Start Date: 03/08/2018', 'Assigned Staff: Staff 1', and 'Head of Household: Spring Love'. Below this, the 'Program Group Members' section lists 'Spring Kid' as 'Active' on '03/07/18'. At the bottom, there is a 'Status Assessments' section with a '+' icon and a date '03/16/2018' next to a 'STATUS' button.

Spring Love

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION

SEARCH CASELOAD

Elle Bravo, Agency A MB

PROGRAM: KERRI'S PROGRAM A

Enrollment History Provide Services **Assessments** Notes Files Forms [Exit](#)

Assessments LINK FROM ASSESSMENTS

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

7 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 03/08/2018

Assigned Staff: Staff 1

Head of Household: Spring Love

Program Group Members

Spring Kid 03/07/18 Active

Status Assessments +

03/16/2018 STATUS

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.

The screenshot displays the 'Zip Adeedoodah' client record interface. At the top, a dark navigation bar contains the client name, a grid icon, an envelope icon, the user 'Elle Bravo, Agency A' with a dropdown arrow, and an orange circle with 'MC'. Below this, a horizontal menu lists tabs: PROFILE, SERVICES, HISTORY, PROGRAMS, ASSESSMENTS, **NOTES** (highlighted with a red arrow), FILES, and LOCATION. To the right of the tabs are search and caseload options. The main content area is divided into two sections. The first section, 'CLIENT NOTES', has a dark header bar with 'ADD NOTE' and a plus icon (highlighted with a blue arrow). Below this header, the text 'There are no results to display' is centered. The second section, 'PUBLIC ALERTS', also has a dark header bar with 'ADD ALERT' and a plus icon. Below this header, the text 'There are no results to display' is centered.

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 displays a web form titled "CLIENT NOTES". The form 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 input field showing "01/22/2018" with a calendar icon.
- Time Tracking:** A section with two dropdown menus. The first is labeled "1 hour" and the second is labeled "15 min".
- Note:** A rich text editor area. It includes a toolbar with buttons for Bold (B), Italic (I), Numbers (123), and Bullets (•). The text area contains the following content:
 - Had initial discussions today with Zip Adeedoodah to review his personal goals.
 - A bulleted list item: "Always have a wonderful day."
- Buttons:** 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



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	<div><div>B Bold <i>I</i> Italic Numbers Bullets</div><p>Please ensure that Big Bird and his brother Little Bird are assigned a bed within the same building.</p></div>

Private

☐

ADD RECORD

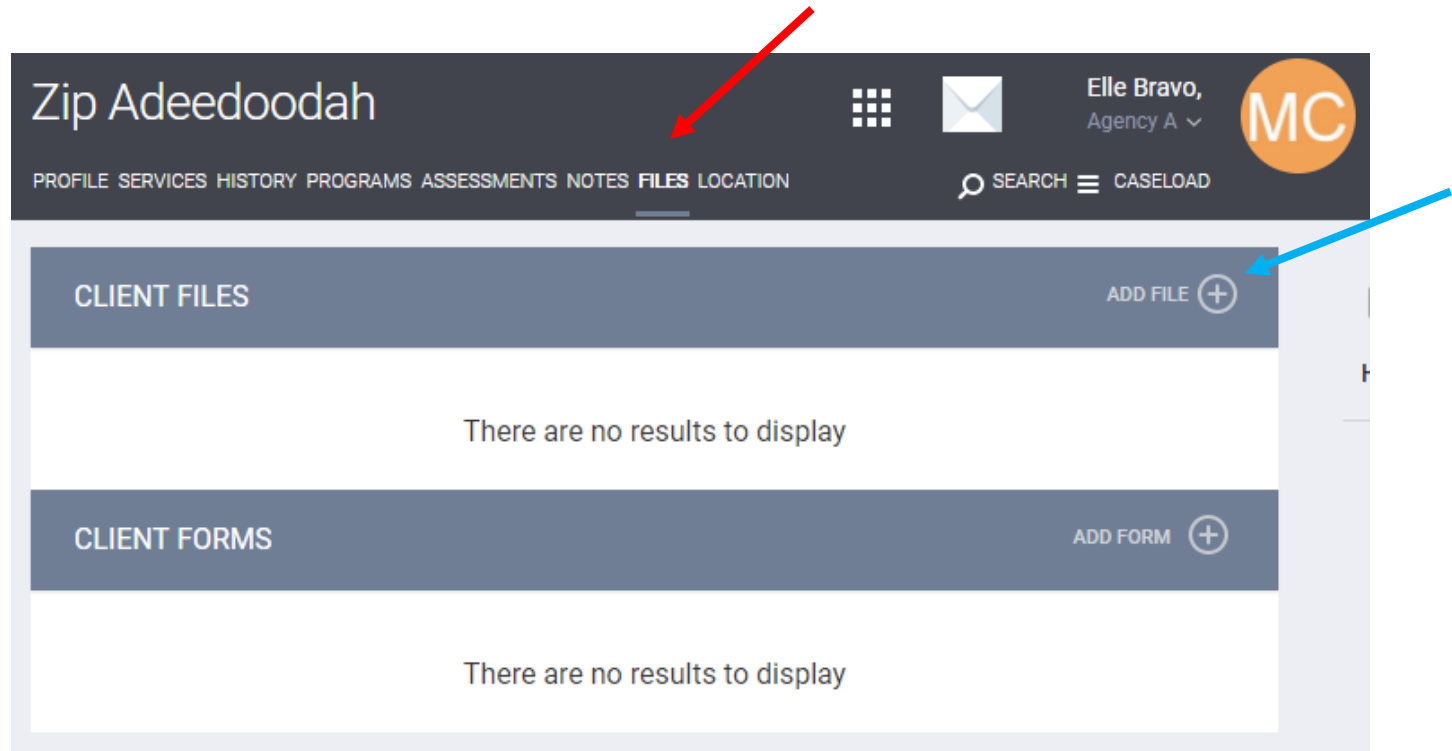
CANCEL

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

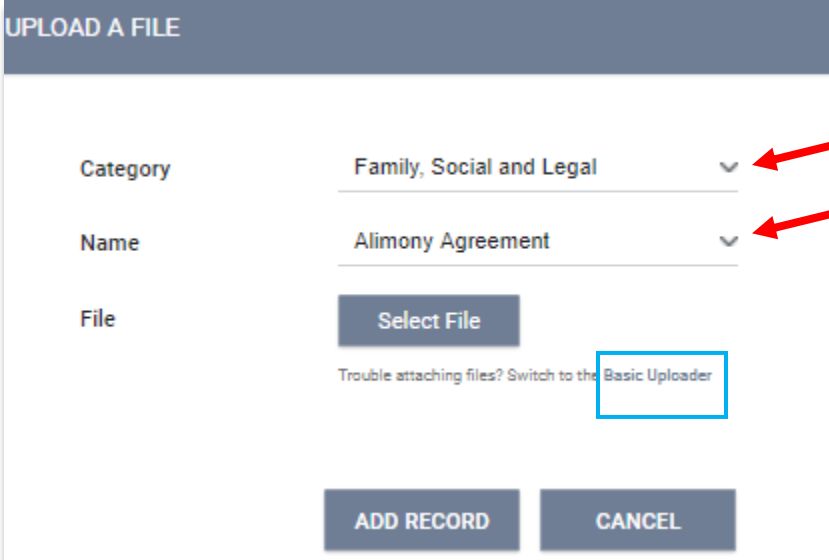
To add a new file, select *Add File* link on the top right corner of the File section (blue).



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". It contains three main sections: "Category" with a dropdown menu showing "Family, Social and Legal", "Name" with a dropdown menu showing "Alimony Agreement", and "File" with a "Select File" button. Below the "Select File" button is a link that says "Trouble attaching files? Switch to the Basic Uploader". Two red arrows point to the dropdown menus for "Category" and "Name". A blue box highlights the "Basic Uploader" link. At the bottom of the form are two buttons: "ADD RECORD" and "CANCEL".

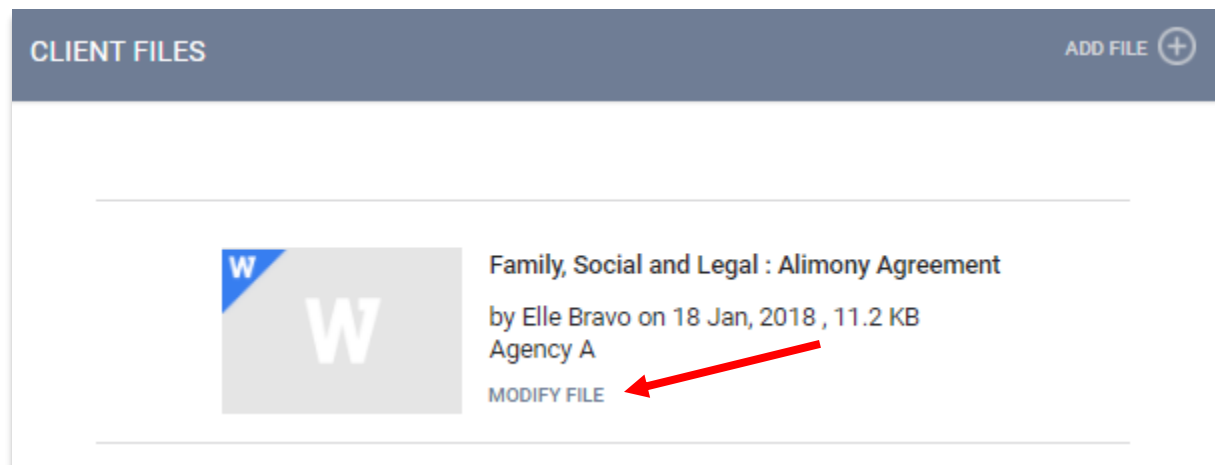
Category	Family, Social and Legal
Name	Alimony Agreement
File	Select File
	Trouble attaching files? Switch to the Basic Uploader
ADD RECORD CANCEL	

Working with Existing Client Files

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

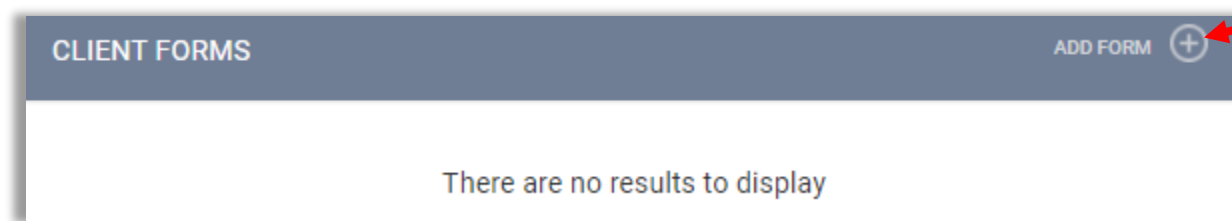
- Category and File Name – selected from drop down menu at the time of upload
- Name of staff member who uploaded the file
- Date of upload
- Size of the file
- Agency associated with the file upload

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).



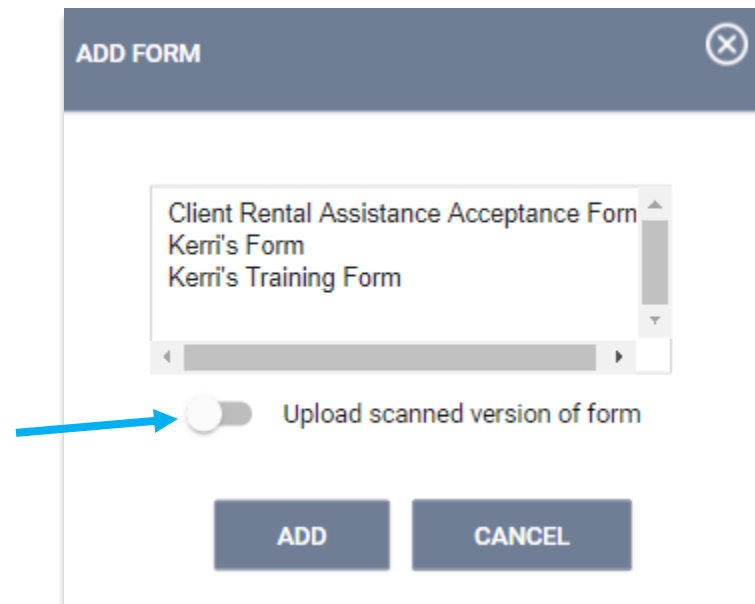
Uploading a Client Form

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.



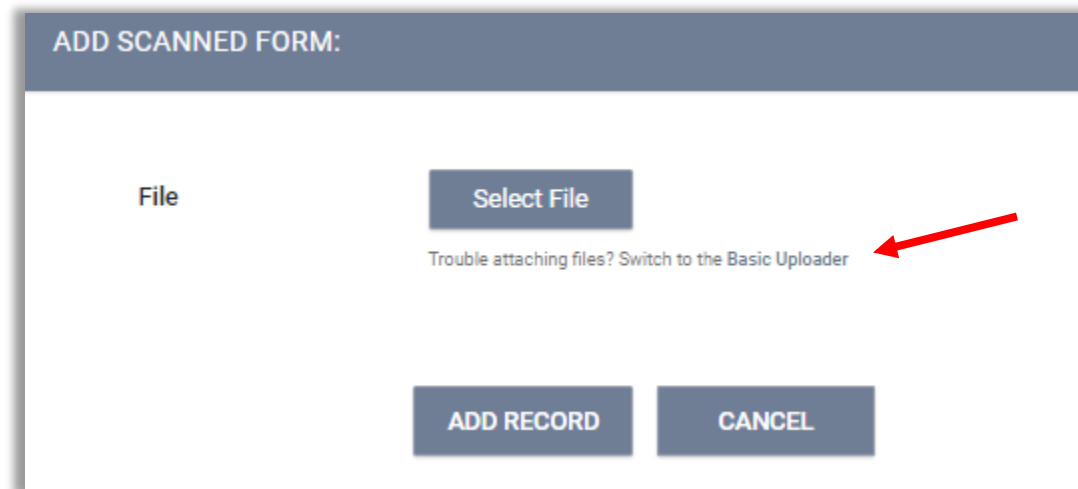
Upload Scanned version of form:

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*).



The screenshot shows a dialog box titled "ADD SCANNED FORM:". Inside the dialog, on the left, is the label "File". To its right is a button labeled "Select File". Below the "Select File" button is a link that reads "Trouble attaching files? Switch to the Basic Uploader". A red arrow points to this link. At the bottom of the dialog are two buttons: "ADD RECORD" and "CANCEL".

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.

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


PROGRAM HISTORY

Program Name	Start Date	End Date	Type
 NBN ES Agency A 	01/03/2018	Active	Individual

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*.

4 DAYS ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	12/30/2017
Assigned Staff:	Elle Bravo 
Head of Household:	Zip Adeedoodah

CHANGE ASSIGNED STAFF

Make Program Private ☐

Elle Bravo

SAVE CHANGES CANCEL

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

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

Elle Bravo, Agency A MC

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.

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

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 
<div>  Program  Service  Referral  Reservation  Assessment </div>		

Additional Assistance

For any additional technical assistance

Email us: helpdesk@ctagroup.org

OR

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

