SANTA BARBARA CONTINUUM OF CARE

Homeless Management Information System

January 2025

COUNTY of SANTA BARBARA
HOUSING &
COMMUNITY DEVELOPMENT

HMIS Workflow: Enroll Client

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New & Existing Clients
The workflow for adding the following is the same:

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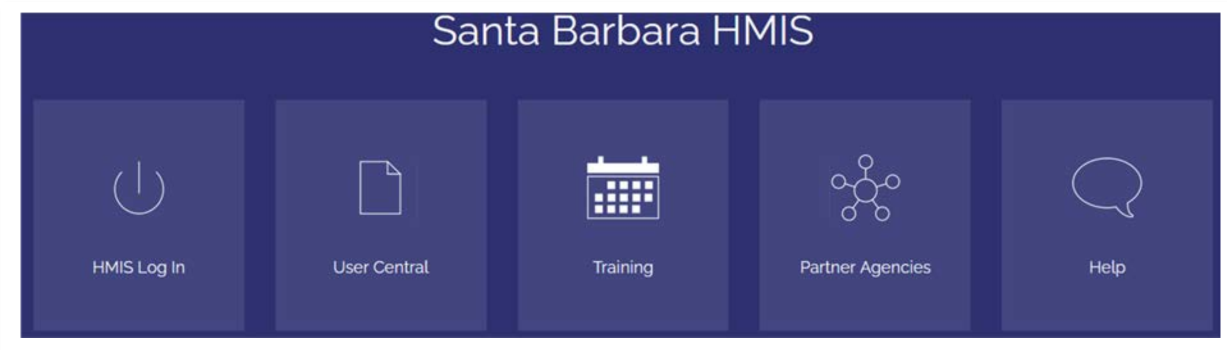
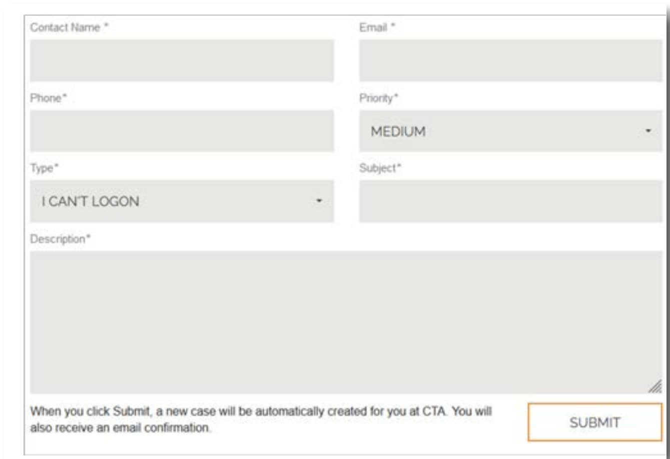
Merced HMIS Web Portal

The portal is your online resource for HMIS. You can find the portal at: https://ctagroup.org/santa-barbara-hmis/

The portal provides the following online resources:



- **HMIS Log in**: click to access HMIS
- **User Central**: repository of workflow manuals, Intake forms and other HMIS-related documents
- **Training**: Details upcoming trainings.
  Includes an on-line reservation system for users to sign up for a training
- **Partner Agencies**: A list of HMIS participating agencies.
- **Help**: CTA's Help Desk. HMIS users can quickly file a ticket requesting assistance. To file a request for help: click **Help:**
  - Enter in your name, email, and phone number
  - Type, Subject, Description: use these field to let us know what the issue is
  - Note: If it is a client related issue, do not enter their name in the **Description** field. Instead, enter their HMIS client ID
  - Click **Submit**



Key Differences between Clarity (new HMIS) and previous HMIS

There are a number of differences between Clarity (your new HMIS) and your previous HMIS. Here are 4 key differences:

Number 1
No Enter Data As, except to VI-SPDAT

In your previous HMIS, you would access your account, then select a program from Enter Data As.

In Clarity, you have access to all your Agency's programs. **There is no Enter Data As, except when it's time to VI-SPDAT a client.**

To VI-SPDAT a client: select "County of Santa Barbara Community Services (HAP) by clicking on your Agency's name listed under your name.

See page 23 for details

Number 2
No Back Dating

In your previous HMIS, there were times you would need to use the Back Date feature in order to enter data with an entry date prior to the current date.

There is no back date feature in Clarity.

When entering client data: If you need to change the date, simply change the date.

Number 3
Universal ROI

In your previous HMIS, you needed to enter a separate ROI for every Agency and program.

The ROI in Clarity is universal.

In Clarity, the Agency entering a client for the first time in HMIS is responsible for entering the ROI. Once that ROI is entered, no other Agency or program needs to enter a new ROI.

In your previous HMIS, you created the household, then entered a ROI for the entire household.

In Clarity, you enter each household member, add the ROI for that member, then configure the household.

Number 4
Conditional Formatting

In your previous HMIS, all questions would display, even if a question did not apply to your client.

In Clarity, if a question does not apply to your client, then that question does not display.

Example: If No is selected for "Veteran Status", then no other Veteran related questions appear. If Yes is selected for Veteran Status, then additional questions display (years of service, theater of operation, branch, discharge status).

HMIS Workflow Overview

Search for client by first or last name, date of birth, social security number, or any combination:

- **Client not in HMIS:** Follow workflow for **New Client**, starting on page 6
- **Client in HMIS:** Follow workflow for **Existing Client**, starting on page 20

You can also search for a client who was in your previous HMIS by using their WellSky client ID(note that this does not work for small IDs (4 digits or less).

If you have any documentation on your client with their WellSky client ID, update the document with their Clarity ID.

After searching for the client:

New Client (client is not in HMIS)	Existing Client
1. Click Add Client **2.** **Create A New Client** page displays **3.** Enter data & add **Release of Information** data **4.** Enrolling Household Members? Click **Manage** to add members **5.** Optional: Add yourself as a **Care Team Member** **6.** Click client's **Programs** tab **7.** Click on the program to enroll your client **8.** Click **Enroll** **9.** Answer intake questions **10.** Click **Save & Close**	**1.** Click on client's name **2.** Review profile data. Update as needed**.** **3.** Client enrolled in your program? Click on program listed to access client's enrollment, history, assessments, notes, files**.** **4.** **Client not enrolled in your program?** Follow **New Client workflow**, beginning with #6 (Click **Programs** tab)**.**

Pages 23-26 details how to add:

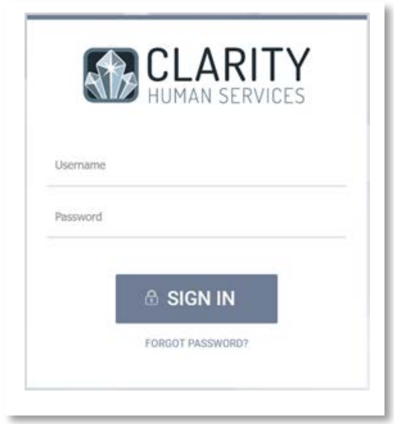
Services
Assessments
Notes
Files

Access HMIS

Link to HMIS site: https://santabarbara.clarityhs.com/

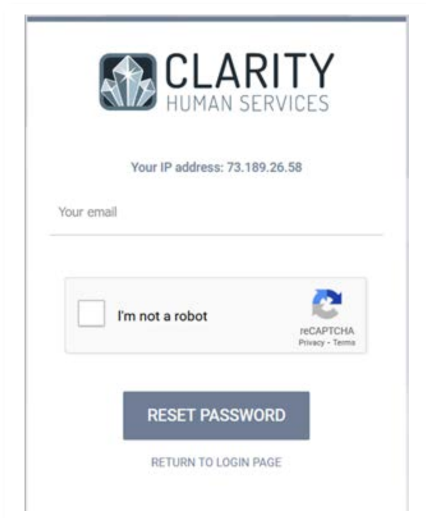
Enter your **Username** and **Password**.

Click **Sign In**.



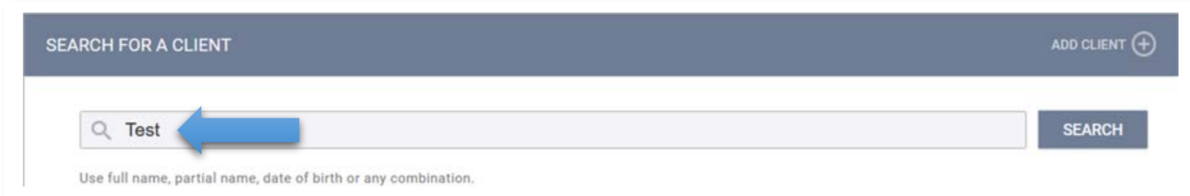
Forgot Password?

- Click **Forgot Password?**
- Enter in your email address.
- Click **I'm not a robot box.**
- Click **Reset Password.**



New Client Workflow

Search for the client to ensure the client is not in HMIS.



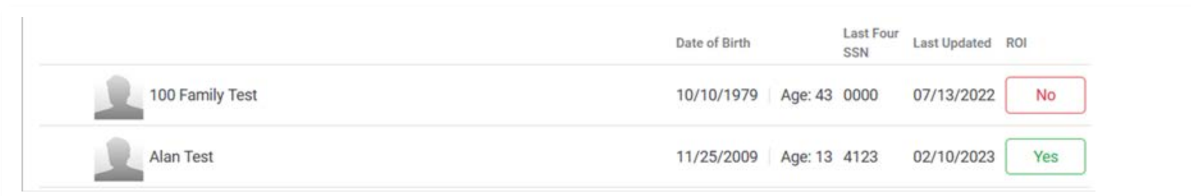
In the Search bar (blue arrow) type in the first name, last name, date of birth, social security number, or any combination of these.

<u>You can also search for a client by using their WellSky client ID</u>.

In this example, “Test” was entered as the last name.

Click **Search**

If there are any possible matches, matches will appear.



Possible matches list the client’s name, date of birth, last 4 SSN, last updated, and if there is a ROI.

- What does a **red No** under ROI mean? The client does not have a current ROI. You will need to add a new ROI
- A **green Yes** means a current ROI has been added for the client

Is your client in HMIS?

- **No.** Then you will need to add the client. **<u>Go to next page</u>**
- **Yes**, the client is in HMIS. Go to page 20

Add New Client

If your client is not in HMIS, then click Add Client (yellow arrow) located on the right side of the Search bar.

Create a New Client page appears.

Begin by entering **Social Security Number** (green arrow), then continue to enter other requested data.

- Enter all 9 digits or the last 4 digits of their SSN
- If client declines to give their SSN, enter 9 0s (zeroes)
- A pop-up window may appear if you do not enter all 9 digits. Click **OK** on the pop-up window to continue

Document Readiness (orange arrow)
Details documents needed for this client.

- This section is optional to complete in adding a new client
- Have documents? Click **Select** to select Yes, No, N/A
- You can return at a later date to complete this section

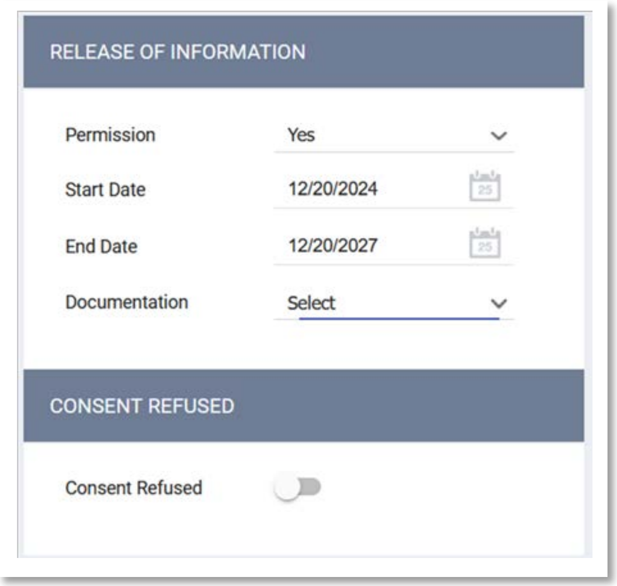
Clarity will not allow you to add the client to HMIS until you have entered their Release of Information (ROI).

Go to next page for details on how to add the ROI.

New Client: Add Release of Information

The **Release of Information** section is located at the top right of the page

- **Permission** is set to **Yes**
- **Start Date**: displays current date
- **End Date**: displays date 3 years later
- **Documentation**: select best match



Documentation options:

- **Electronic Signature**: select if the client will electronically sign
- **Attached PDF**: If selected, you will be prompted to attach the PDF
- **Signed Paper Document**: If selected, you will be prompted to add the location of the document
- **Verbal Consent**: If selected, no further action is needed
- **Household**: Select if the client is in a household with the head of household

What if the client declines to sign the ROI?

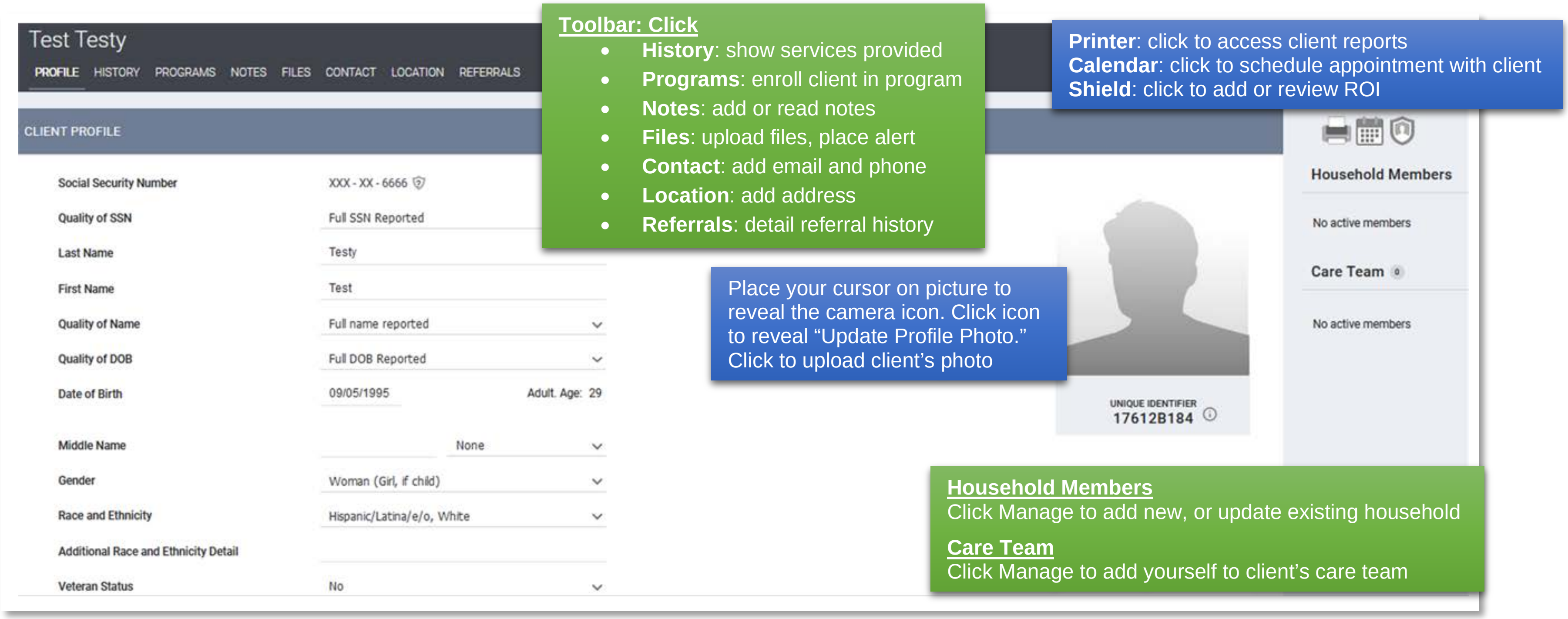
- **Permission**: change the Yes to No
- **Start Date**: displays current date
- **End Date**: will be blank. Enter an end date. You can enter any date up to 3 years
- **Consent Refused**: click on toggle to change it to blue

Once you complete the **Release of Information:** Scroll down to the bottom of the page

- **Add Record** will appear
- Click **Add Record**

New Client: Client Profile

After clicking **Add Record**, the client's **Profile** page displays.



Click **Save Changes** after making any changes.

New Client: Client Privacy

The data you enter on a client is default open. Meaning, other agencies can see the data. Sometimes a client will request their data not be shared with other agencies. If this is the client's request, you set the Permission to "No" when entering their ROI (Release of Information). See page 8 for details.

You can also make one or more sections of the client record private, leaving the other components of client file open. For example, you can enter a note in the client's file, and set that note to Private. Other areas that can be set to Private:

• Assessments	• Files	• Program Enrollments
• Contact Records	• Location Records	• Referral
• Coordinated Entry Events	• Notes	• Service Items

When you make the client record or any of the above components private, only staff members at your agency will be able to see the information

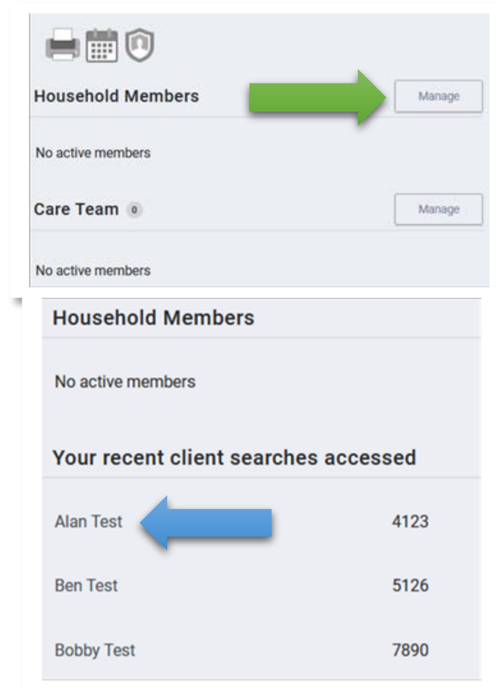
Make Location, Contact, Notes, Files, Service Items, and Referrals Private
When you entering or entering data in any of these components, you will see Private (green arrow)

Click on the toggle to activate it, it will turn blue (blue arrow). Blue means the information is now private.

New Client: Adding Household Members

Before creating a household, make sure each household member is in HMIS**.** If a member is not in HMIS, add that member by creating their client profile.

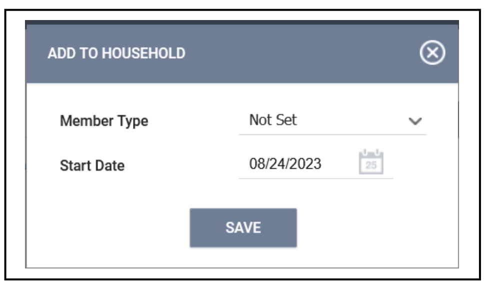
[Is your client single? Proceed to Contact (page 14)](#).



To create a new household:

- Go to the head of household's profile page
- Click **Manage** for **Household Members** (green arrow). The **Household Management** page will display
- Your recent searches (including adding new clients) will display under **Your recent client searches accessed** (blue arrow)
- **Is a household member listed?** If yes, place your cursor on the client's name. A **+** sign will appear to the right. Click on the **+** sign

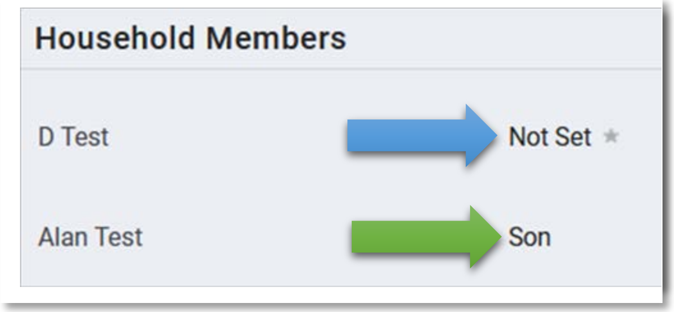
In this example, Alan Test (blue arrow is a household member). Place your cursor on Alan's name, look to the right, and click on the **+** sign.



Add To Household will pop-up.

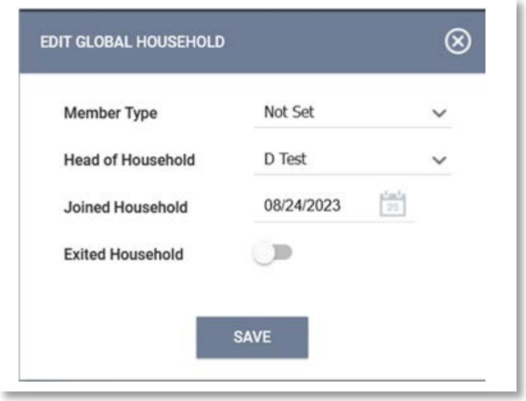
Member Type: select best match
Start Date: defaults to today's date
Click **Save**

New Client: Adding Household Members



You will be returned to the **Household Management** page.

- Alan Test display as Son (green arrow)
- D Test displays as Not Set (blue arrow)
- Place your cursor on **Not Set**. A pencil icon will appear to the right
- Click on the pencil icon. Edit Global Household pop-ups



Member Type: select best match. In this example: D Test is the father.

Head of Household: since we started creating the household from D Test's Profile, D Test defaults to the head of household.

Joined Household: defaults to today's date. Change if needed.

Click **Save**

Need to add more household members? Repeat the above to add more household members.

One or more members not listed under <u>Your recent client searches accessed</u>? See next page for details.

New Client: Adding Household Members

If one or more members are not listed under recent searches, you will need to search for the client. On the **Household Management** page, enter the name of the client in the search field (black arrow).

Enter name (black arrow), then click **Search**. Search results will display.

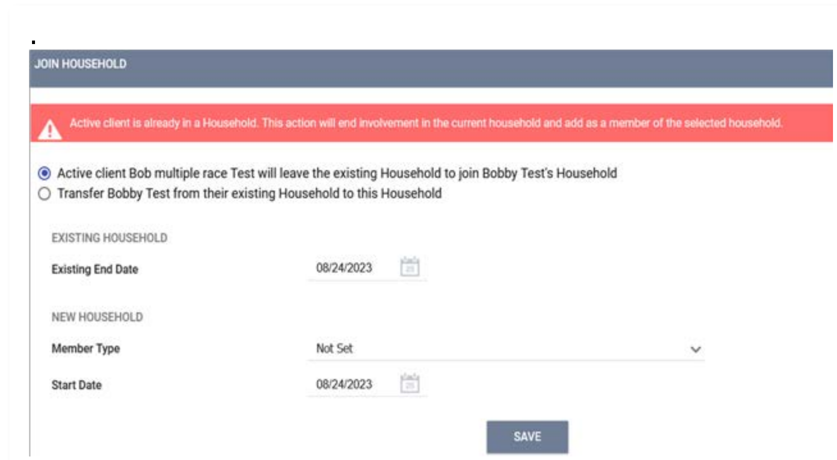
Place your cursor on the name. A **+** sign will appear to the left. Click on **+** sign

Add to Household will display. Select best match for **Member Type**, then **Save**

Need to add more members? Repeat the process

Finished creating the household? Time to enroll your household.

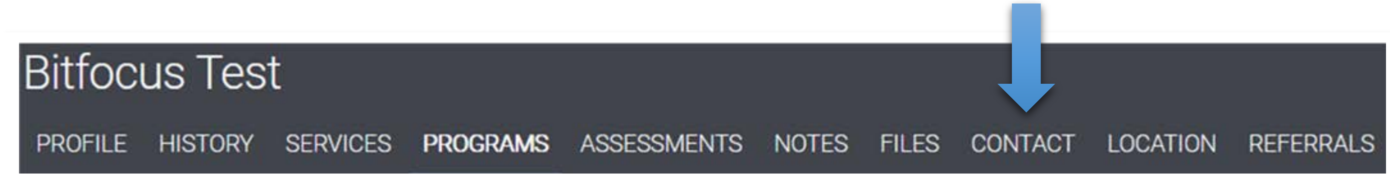
You may receive an alert that a client is already in a household. **Clients cannot be in 2 different households at the same time.** In the above screenshot, Bobby Test is already in a household. If you attempt to add Bobby Test to this household, a pop-up will display.



If you transfer this client to a new household, the client will be exited from their current household. To do this:

- **Existing Exit date:** change date if necessary
- **Member Type**: select best match
- **Start Date**: change if necessary
- Click **Save**

Add Contact Information

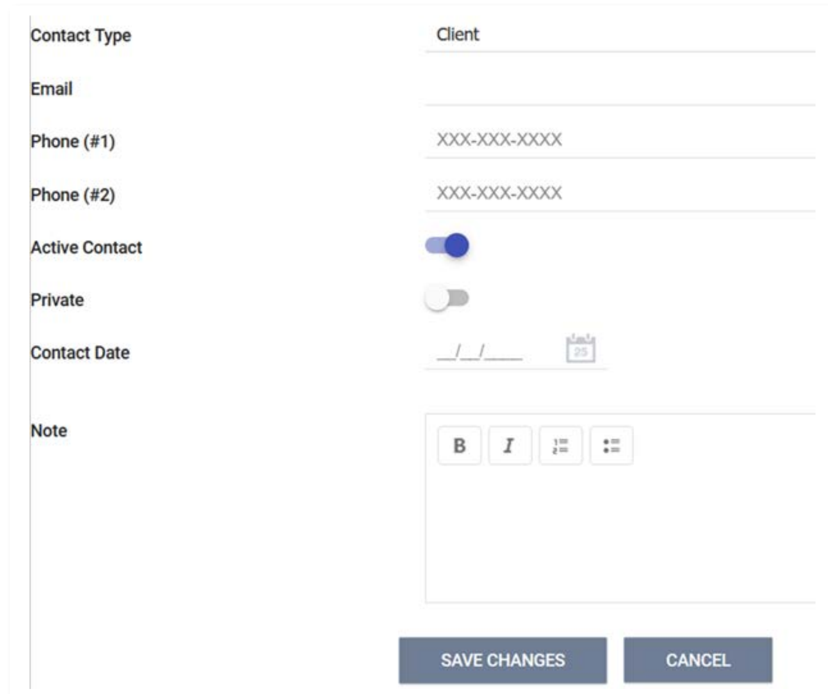


Add Contact Information

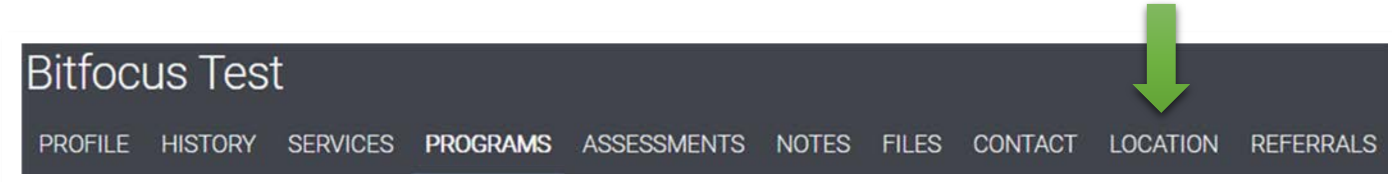
- Click **Contact** (blue arrow)
- Click **Add Contact +**
- Note: all data fields are optional.
- Enter **Email**, **Phone**, **Contact Date,** and **Note**.
- **Private:** click on toggle, it will turn blue

Note: Setting **Contact** to private means other agencies will not be able to see the client's contact data

- Click **Save Changes**



Add Location Information

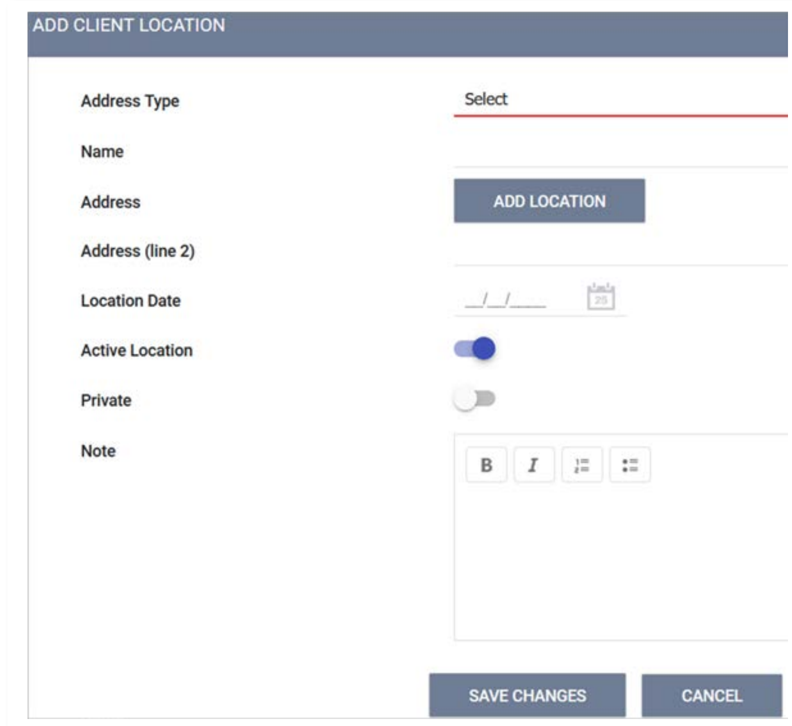


Add Contact Information

- Click **Location** (green arrow)
- Click **Add Address +**
- **Address Type**: select best match
- **Name**: enter client's name
- **Add Location**: click to display pop-up. Enter client's address. Click **Add**
- **Location Date**: enter date
- **Private:** click on the toggle to make the record private, the toggle will turn blue

Note: Setting **Location** to private means other agencies will not be able to see the client's location

- **Notes:** enter a note (optional)
- Click **Save Changes**

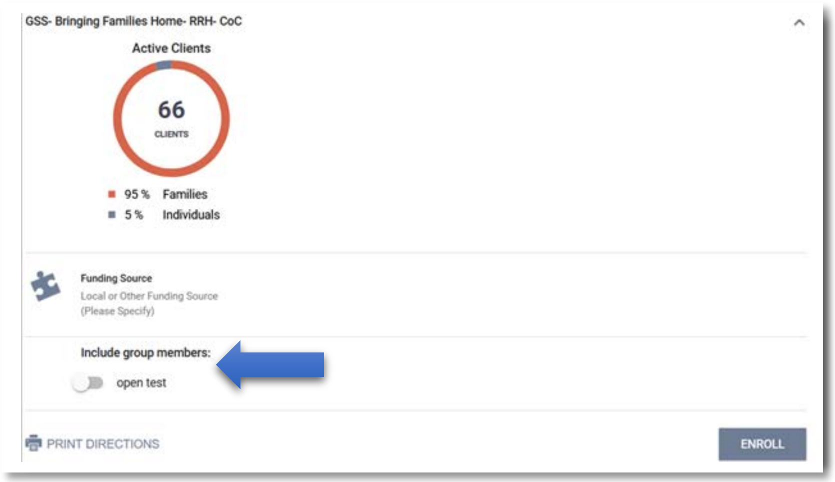


New Client: Programs

Click **Programs** on the Toolbar to begin the enrollment process into your program. If your client is already enrolled in a program, that information will display in **Program History**.

Scroll down to see **Programs: Available**

- A list of your agency's programs will display
- Click on the program where you want to enroll the client
- In this example: **Bringing Families Home** selected
- **Include group members** (blue arrow): click on the toggle. It will turn blue and that person will be included in the enrollment
- Click **Enroll**

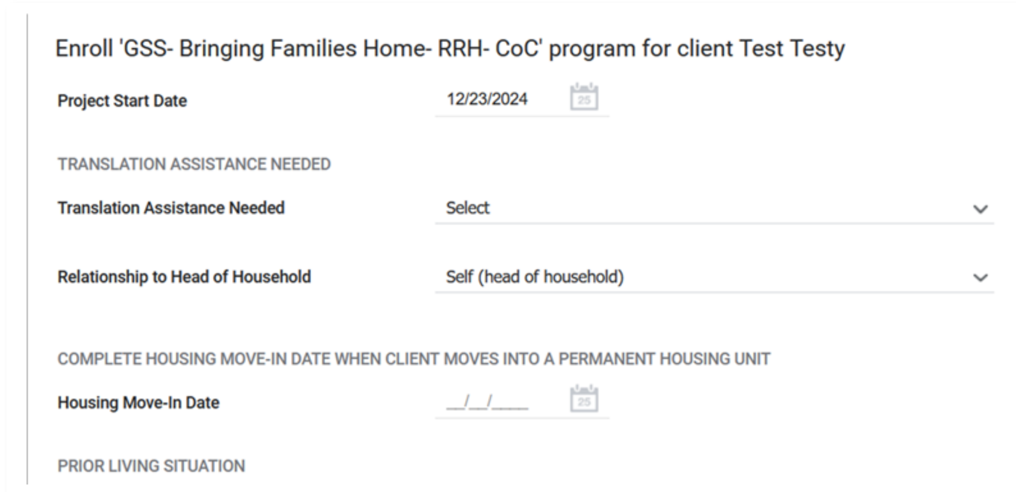


Recommendation
If you will be enrolling a family, begin the enrollment process from the head of household's file.

New Client: Programs

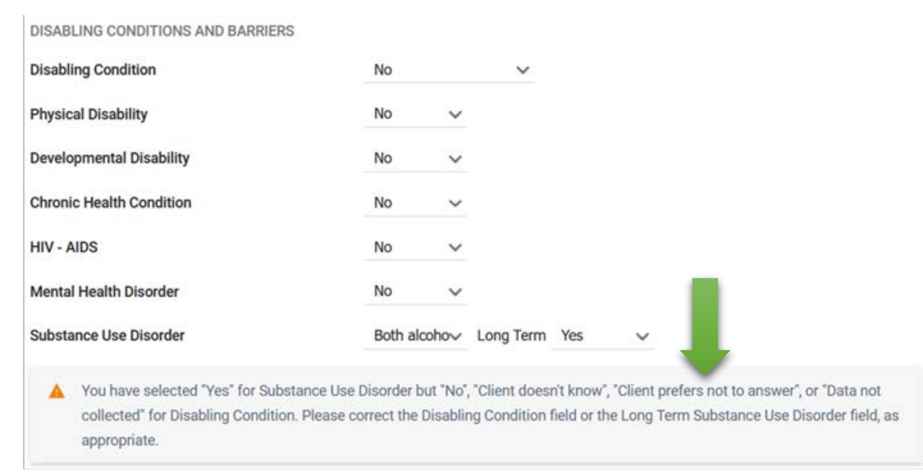
After clicking **Enroll**, the Intake questions will display. The screenshot to the left details the first 5 questions on the Intake:

1. **Project Start Date**: current date displays. Change if needed
2. **Translation Assistance Needed**: select best match
3. **Relationship to Head of Household**: If head of household, then Self (head of household) displays
4. **Housing Move-in Date**: leave blank. Add date when client moves into their permanent housing unit
5. **Prior Living Situation**: enter data



Disabling Conditions & Barriers

- Select best match for each disabling condition
- You will get an error message (green arrow) if there is a problem with the data entered
- In this example: **No** was selected for Disabling Condition, but **Yes** selected for **Substance Use Disorder**
- Both cannot be true. If the client has a **Substance Use Disorder**, change Disabling Condition to **Yes**. If **No** for **Disabling Condition** is correct, then change **Substance Use Disorder** to **No**

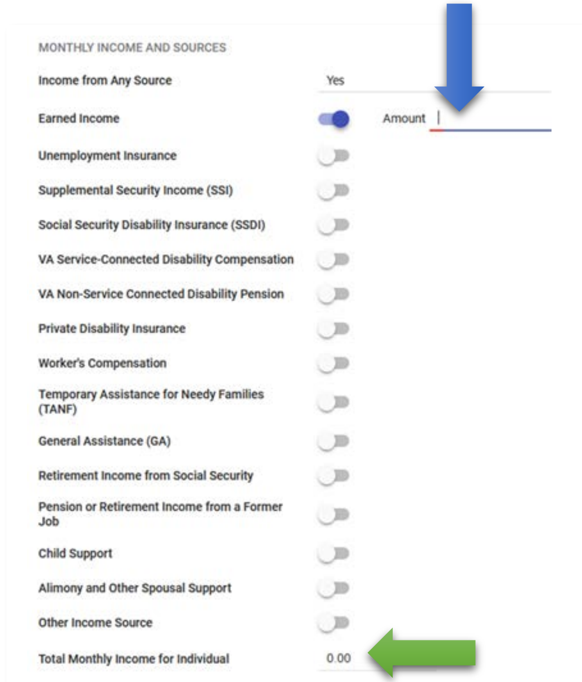


New Client: Programs

Monthly Income & Sources

Income from Any Source:

- If you enter **No**: That's all you need to do. Continue with Non-Cash Benefits
- If you enter **Yes**, then the Income & Sources fields appear
- Select one or more income sources by clicking on the toggle (it will turn blue)
- The **Amount** field will display (blue arrow). Enter a dollar amount
- For every income source selected: enter a dollar amount
- **Total Monthly Income for Individual** (green arrow): Clarity will calculate the amount based on the dollar amount entered for each income source



Scroll down to Non-Cash Benefits

- If **No** entered, continue to Health Insurance
- If **Yes** entered, types of Non-Cash Benefits will display. Select one or more types

Scroll down to Health Insurance

- If enter **No**, you are done with this section
- If enter **Yes**, select type of health insurance

If client is Single: Save displays. Click **Save** to continue

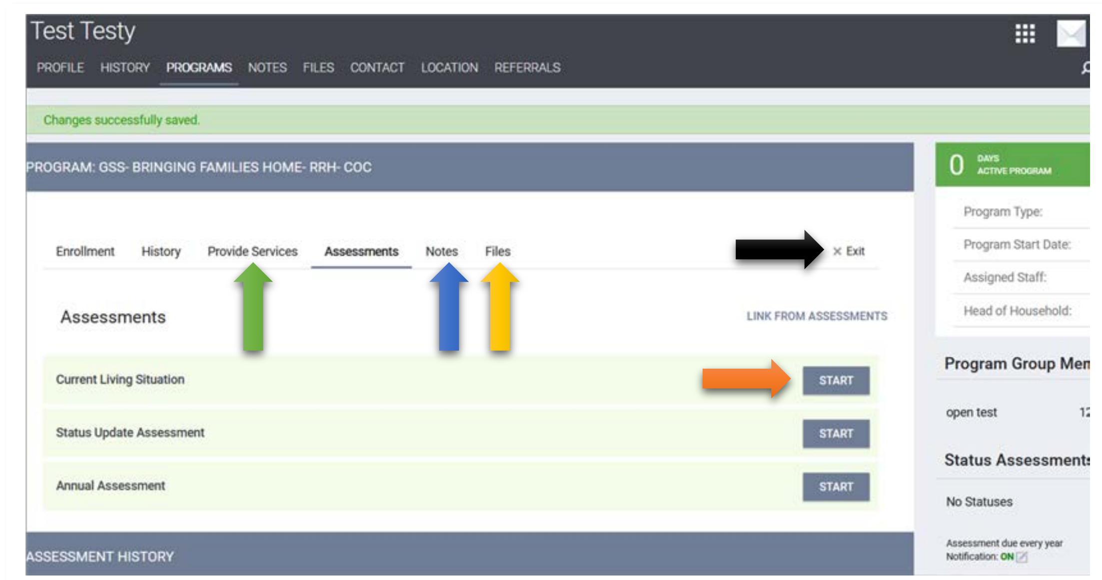
If client is in a household: Save & Next displays. Click **Save & Next** to display intake form for next household member.

- If client is a child, Clarity will configure the intake form to display only the questions applicable to a minor.

New Client: Assessments

After saving the enrollment, the Program page will display. From here, you can:

- Complete an **Assessment** (see bottom of page on completing an Assessment)
- Click **Provide Services** (green arrow) to add services or review services provided
- Click **Notes** (blue arrow) to add a note or to review existing notes
- Click **Files** (yellow arrow) to add a file or review existing files
- Click **Exit** (black arrow) to end the client's enrollment in the program



How to complete an Assessment

Locate the **Assessment** (in this example we've selected **Current Living Situation**

- Click **Start** (Orange arrow)
- Since this client is in a household, a pop-up appears listing household members.
- Click **Add Current Living Situation.**
- Enter the requested data. Click **Save & Next.**
- Enter data for the next household member.
- More household members? Click **Save & Next**.
- Click **Save & Close** when data for all household members entered.

When do I enter a Status Update Assessment? When a significant change takes place in your client's life after enrollment. For example, if your client had no monthly income at enrollment, but now is receiving $750 in monthly income, click Start on Status Update Assessment and enter data on the client's income.

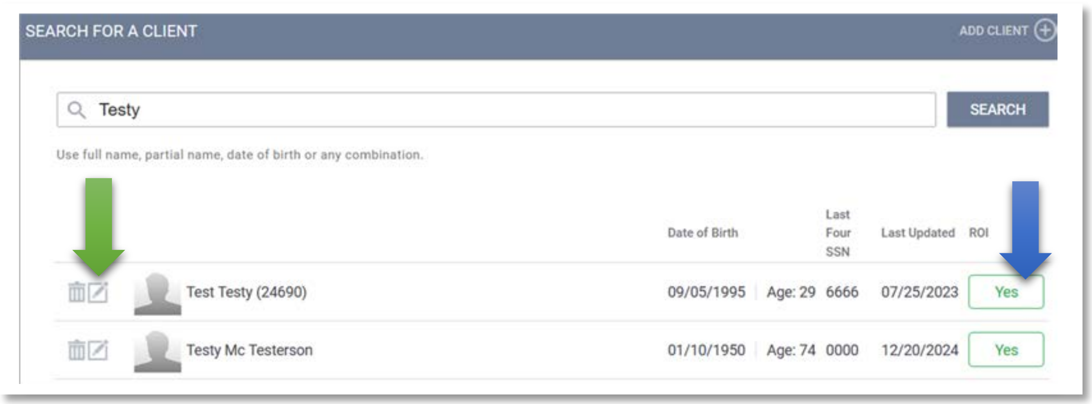
When do I enter an Annual Assessment? If your client is enrolled in your program for a year or more, HUD mandates that you complete an **Annual Assessment**. For example: if this client was enrolled on 8/26/2022, you would complete an **Annual Assessment** within 30 days of 8/26/2023.

Existing Client Workflow

This section assumes the client is in HMIS, and that you are familiar with Clarity. If you need assistance with:

- Searching for a client: Go to page 6
- Adding contact and location information: Go to pages 14 & 15
- Enrolling the client in your program: Go to page 16

Your client may be new to you, but they may already be in HMIS. Search for the client and in their name displays:



In this example, 2 names appear when "Testy" was entered in the Search bar

Click on the pencil icon to the left of client's name (green arrow) to access their profile page

A green **Yes** (blue arrow) means a ROI has been entered for the client. You do not need to enter a new ROI

If you see a red No for their ROI, it means they do not have a valid ROI. You will need to enter a new ROI. Go to next page for details on how to add a new ROI.

Existing Client Workflow: Enroll in a Program

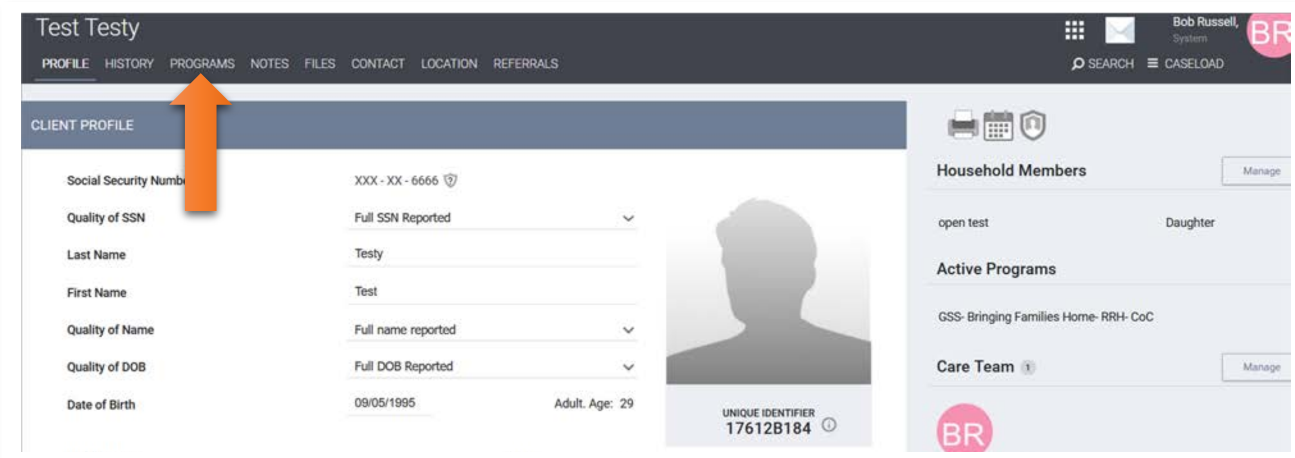
After clicking on the pencil icon, the client's Profile page will display.

On the right side of the screen:

Household members: Lists household members. If no names listed, client is single

Active Programs: Lists any programs client currently enrolled in

Care Team: Click Manage to see client's care team, or to add a new care member

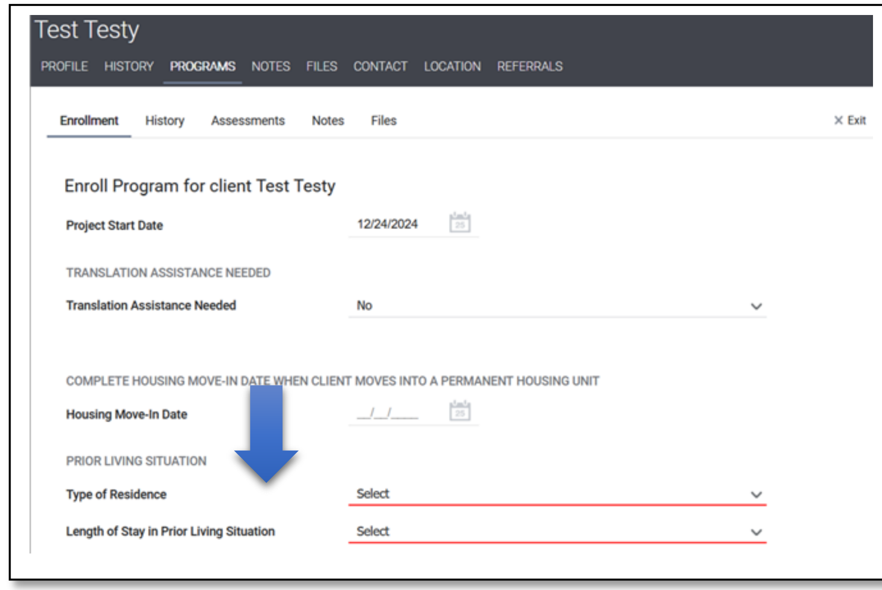


Client already enrolled in your program?
Place your cursor over the program listed under Active Programs. Pencil icon will appear. Click on the pencil to display their enrollment data. You will be on the History page of the enrollment.

Client not enrolled in your program?
Click Programs (orange arrow) to display **Program History** and **Programs: Available**. In **Programs: Available**, click on your program to begin the enrollment process.

Need help in entering data? Go to **New Client: Programs** (page 16)

Existing Client Workflow: Enroll in a Program



Why is there missing data?
The client was added to HMIS some time ago. I enrolled the client in a program. Some data fields are empty, while other data fields have data (or all data fields are empty). In this example, the Prior Living Situation data fields are empty (blue arrow).

When creating a new enrollment or assessment all or some data fields will display no data if the data entered is 180 days (6 months) or older. You will need to enter current data for any empty data fields in order to save the enrollment.

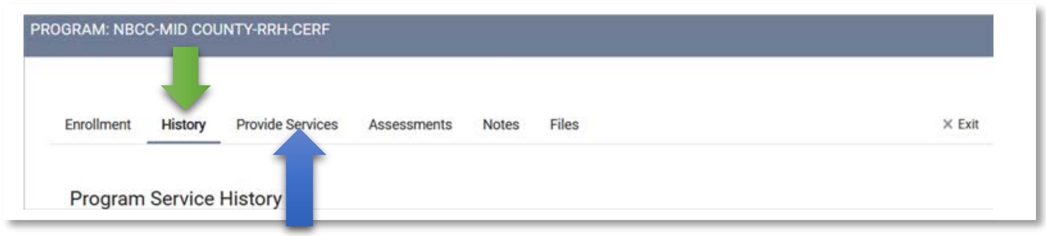
Data does display, but it is no longer valid.
For example, the client was enrolled in another program and their income is listed at $500 per month. But their income is now $750 per month.

- Simply enter the current amount in one or more income sources
- If **Disabilities**, **Non-Cash Benefits**, or **Health Insurance** need to be updated: enter the new data.
- If the client is no longer has any income, simply change the **Yes** to **No** for **Income from Any Source**

Client Workflow: Add Services

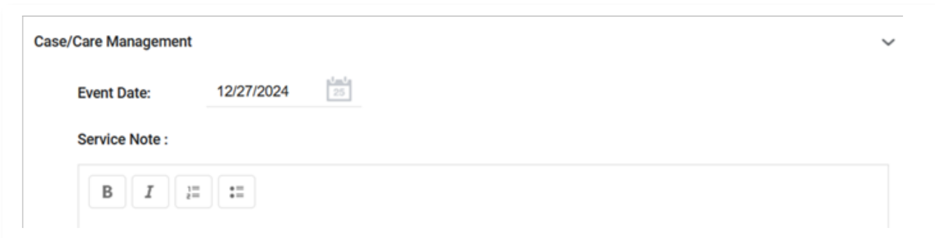
Access the client's file, then click **Programs**. Place your cursor over the program the client is enrolled in to display the pencil icon. Click the pencil icon:

- Click **Provide Services** (blue arrow)
- A list of services will appear. Services listed will depend on what has been configured for the program
- Click on the service you want to add



In this example: **Case Management** selected:

- Event Date: defaults to current date. Change if necessary
- Service Note: enter note
- Some services may allow you to enter additional information (such as time spent with client, a dollar amount, etc.)
- Click **Submit**
- A message will briefly display stating service has been successfully made

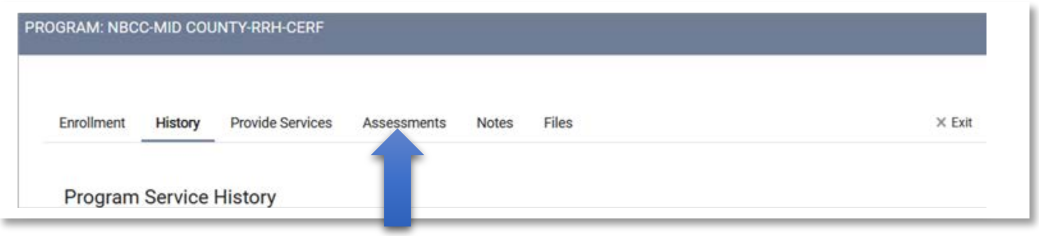


Want to see all services the client has received?
Click History (green arrow) to display services provided

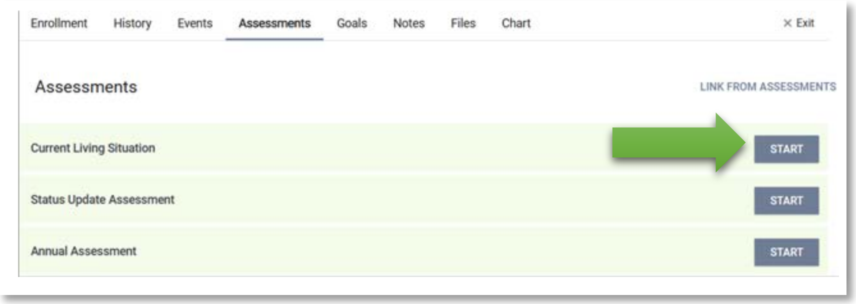
Client Workflow: Add Assessments

Access the client's file, then click **Programs**. Place your cursor over the program the client is enrolled in to display the pencil icon. Click the pencil icon:

- Click **Assessments** (blue arrow)
- A list of **Assessments** will display



- Click **Start** on the assessment
- In this example, **Current Living Situation** was selected (green arrow)
- If the client is in a household, a list of household members will display. Don't want to include a member? Click on the blue toggle change it to white indicating they won't be included
- Click **Add Current Living Situation**
- The assessment will display. Enter data
- Click **Save** (if client is single). If client in household, then **Save & Next** displays.
- If client in household, enter data for household member(s)



Status Update Assessment: select this assessment when there has been a change in the client's life since enrollment (examples: income has changed, did not have health insurance at enrollment, but now has health insurance).

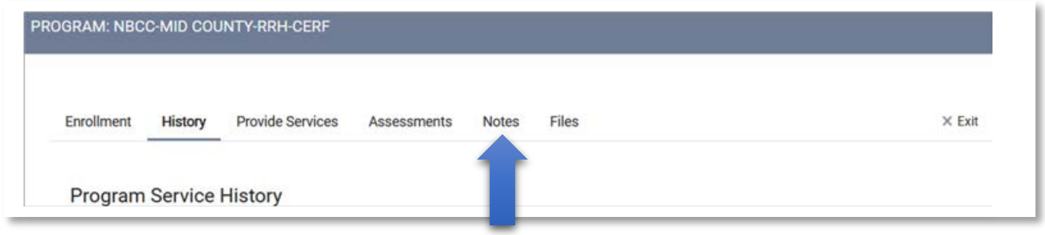
Annual Assessment: select this assessment if the client has been enrolled in your program for one year or longer. HUD requires an annual assessment every year the client is enrolled in your program.

Once assessment data is saved, you will be returned to the Assessments page. If you scroll down, you will see the assessment (plus any other assessments completed on the client) in the **Assessment History** section.

Client Workflow: Add Notes

Access the client's file, then click **Programs**. Place your cursor over the program the client is enrolled in to display the pencil icon. Click the pencil icon:

- Click **Notes** (blue arrow)
- Select **Add Note** (right side of screen)



Title: enter a title for the note

Category: select best match

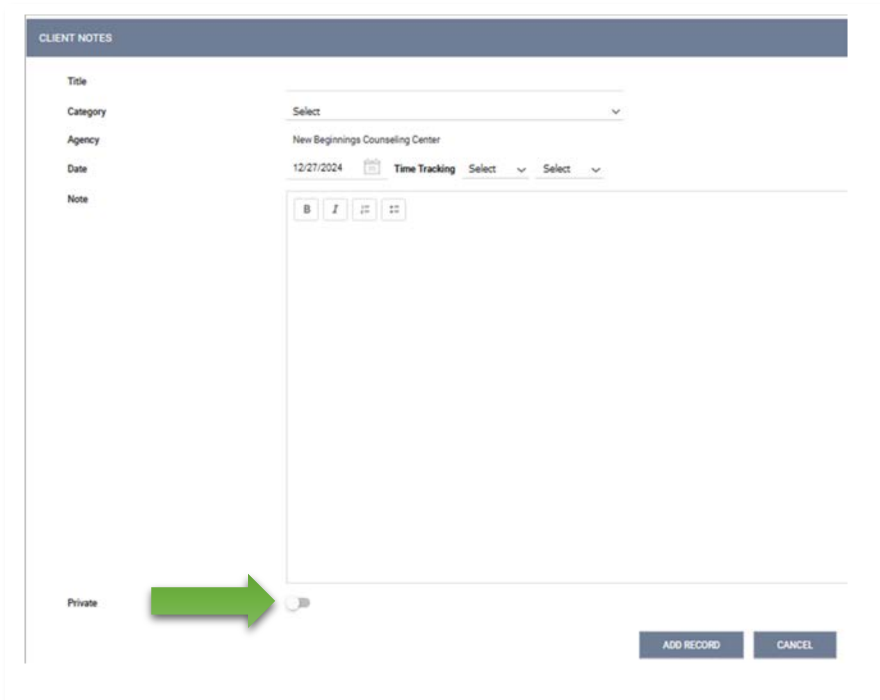
Date: defaults to today's date. Change if necessary

Time Tracking: enter hours/minutes if want to track how much time you spent with the client

Note: enter note data detailing what happened.

Private: click the toggle if you want to make this note private. The toggle will turn blue

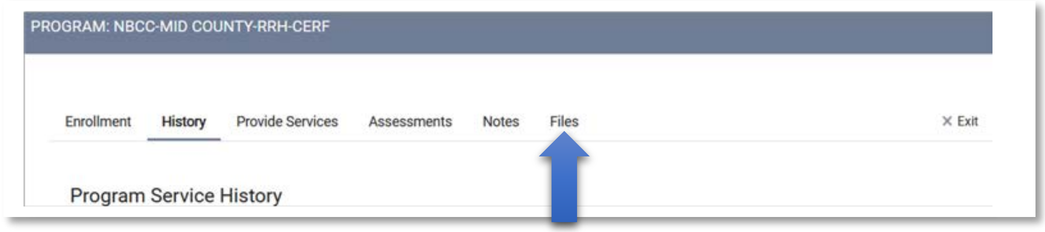
Click **Add Record**



Client Workflow: Add Files

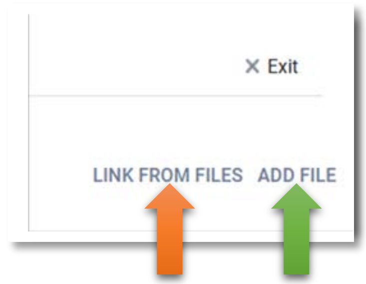
Access the client's file, then click **Programs**. Place your cursor over the program the client is enrolled in to display the pencil icon. Click the pencil icon:

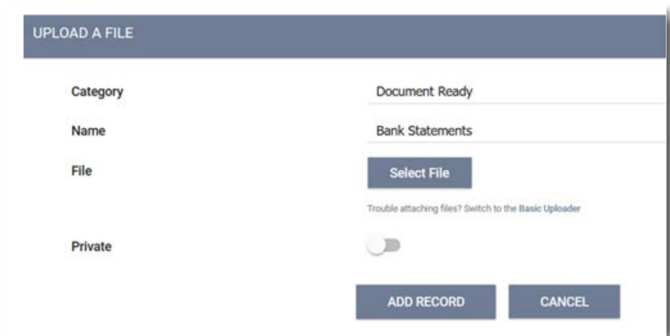
- Click **Files** (blue arrow)



Click **Add File** (right side of screen, green arrow)

- **Upload a File** displays





- **Category:** select best match
- **Name:** select best match
- Click **Select File** to select the file from your computer
- Click on the file, click Open
- **Private:** click toggle to turn it blue if you want to set this file to private
- Click **Add Record**
- Message will display that file successfully saved

What is Link from Files? (orange arrow)
The file you want may have already been uploaded by someone else. Click **Link from Files** to see if any files have been uploaded.

Has the file already been uploaded? To link the file to your enrollment:

- Click the white ball to left of the file
- White ball will turn blue
- Click **Link & Close**
- File will appear in **Client Program Files**

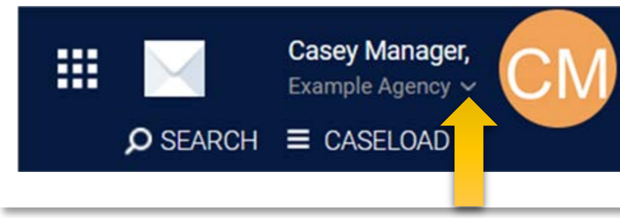
CES: Complete a VI-SPDAT

To complete a VI-SPDAT on your client you will need to first do the following:

- Enter data as **County of Santa Barbara Community Services (HAP)**
- Enroll your client in **CES Coordinated Entry Shared**

How do I enter data as <u>County of Santa Barbara Community Services (HAP)</u>?

- Access Clarity
- Look to the right side of your screen, then click on the v to right of your agency's name (yellow arrow)
- **County of Santa Barbara Community** … will display
- Click on **County of Santa Barbara Community**
- **County of Santa Barbara Community Services (HAP)** will display at the top of the page
- Click Search to find client, then click on their name to access their profile page



To switch back to your agency, click the v and select your agency

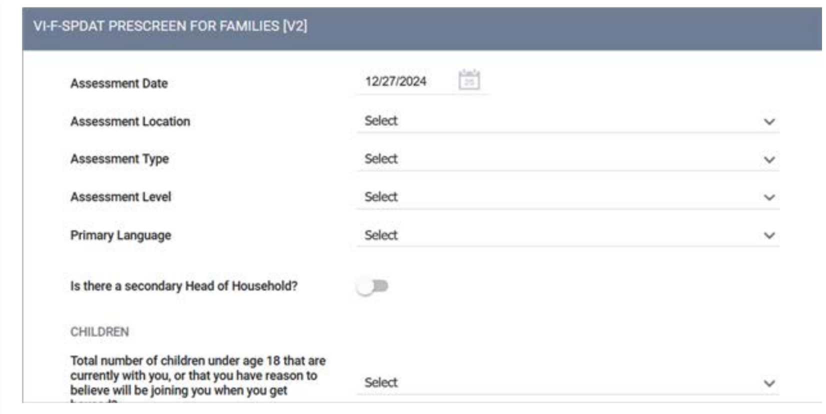
Enroll your client in CES Coordinated Entry Shared program

- If client is in a household, select household members
- Click Enroll
- Intake form will display. Enter data if data fields blank
- **Note:** if client already enrolled in another program, their Intake data will display. Review and update as needed
- If client is in household: click **Save & Next**. Select best match for **Relationship to Head of Household**. If necessary, add or update data.
- Click **Save & Close**
- **Assessments** page display. You may have to scroll down to see the **VI-SPDAT Prescreen** assessments
- Locate the VI-SPAT you want to complete. Click **Start**

CES: Complete a VI-SPDAT

In this example, the **VI-SPDAT Prescreen for Families** selected

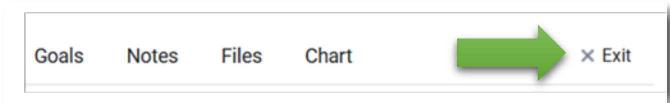
- **Assessment Date:** defaults to today's date
- **Is there a secondary Head of Household?** Click the toggle if there is a secondary. Enter their name, gender, and date of birth
- **Children:** enter the name and date of birth for each child
- Enter data
- Click **Save** when done



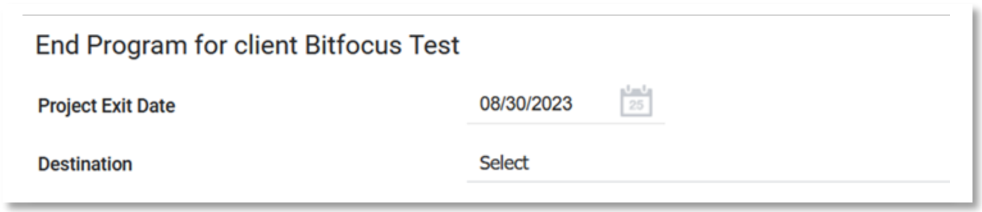
If everything is in order this displays at the top of page:

Client Exit

An Exit is entered for a client when the client is no longer enrolled in your program. When it's time to exit your client, access their enrollment, then click **x Exit** (green arrow).



If the client is in a household, a pop-up will display, listing household members. Select member(s) to include in the exit. Click **End Program**.



The End Program for client page displays:

- **Project Exit Date**: defaults to today's date. Change if needed
- **Destination**: select best match

Review the remaining data fields. Update any field as need. If the client is single, you will be prompted to click **Save & Close.** If the client is in a household, you will be prompted to select **Save & Next**

- Data fields for the next household member will display.
- Change **Project Exit Date** (if needed) to match the exit date entered for the head of household.
- Destination: select best match
- If there are more members, you will be prompted to select **Save & Next**

Once data for all members has been added, you will be prompted to click **Save & Close**