CLARITY
HUMAN SERVICES

HMIS End User Manual

Homeless Management Information System

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Clarity Human Services is a Product of Bitfocus, Inc.

1. GETTING STARTED

Introduction

Training Manual

This introductory training manual is designed with the new user in mind. It is intended to teach the fundamental aspects of Clarity Human Services software. This training manual contains instructions on all of the key elements within the Clarity Human Services workflow.

1. Privacy & Security

Clarity users require a unique username and password. Your username will be assigned to you. Your UserID will be created by us. Usually it will be your first name and last initial ie., Jason Smith> jasons. Please take this time to think of your new password. It must meet the following criteria:

- • Password must be 8 characters or longer
- • Password must contain at least one uppercase character (A through Z)
- • Password must contain at least one lowercase characters (a through z)
- • Password must contain at least one number (0 through 9)
- • Password must contain at least one non alphanumeric characters (!@#$%^&*())
- • Password must not contain spaces

  Example of an acceptable password: SampleP12! (Do not use this one)

Do not share your account

Everything in the system is completely tracked. Every change that is made is traceable. You, as the user, are solely responsible for what happens under your account. Do not share your username and password with anyone, even another HMIS user. If someone at your agency needs access to the HMIS please contact Helpdesk@cafth.org.

Each HMIS user is also required to submit a signed HMIS User Agreement policy prior to system access. The system will prompt you to digitally sign the user agreement the first time you access the system.

HMIS Computer Requirements

- Computers in public areas used to collect and store HMIS data must be staffed at all times.
- Password protected screen savers must be automatically enabled when your workstation is not in use.
- Users will be automatically logged off the system after a period of inactivity.
- Written information pertaining to user access should not be stored or displayed in any publicly accessible location.

The Clarity Human Services software takes advantage of the latest in web technologies. For both security and compatibility, it is extremely urgent that your local IT Staff ensure all workstations are outfitted with the latest version of the Web Browser you use.

The latest version of the following web browsers is supported by Clarity:

- Microsoft – Internet Explorer
- Mozilla – Firefox
- Google – Chrome
- Apple – Safari

- Clients MUST be given a notification form that explains HMIS and why their personal information is being collected.
- Clients MUST also be given a consent form, which they must sign and agree to.
- If a Client does not consent to share their information their information can still be entered into the HMIS but their information will not be shared outside of your agency (i.e. their profile will not show up in a system search).

  There are Several ways to document client consent in Clarity:

Client Consent & Notification

- • Electronic Signature
- • Attached PDF which must have the client signature
- • Signed Paper Consent (Enter your location in the Location text box)
- • Household or Group Member – Select if the client is a minor and an adult

  household/group member signed the Consent.

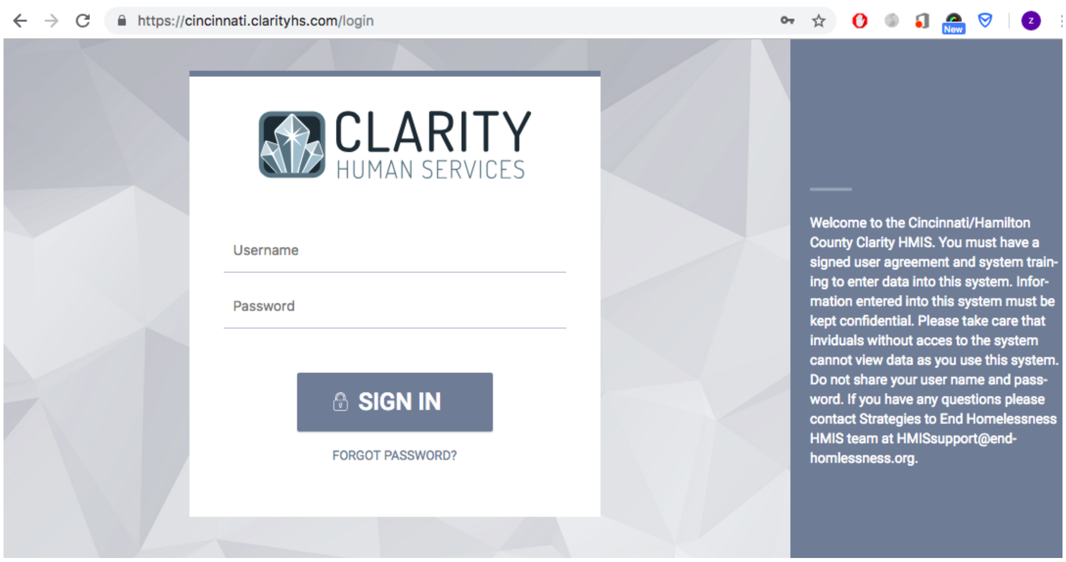
- • None – Client data will not be shared outside of your agency

2. Log in to Clarity

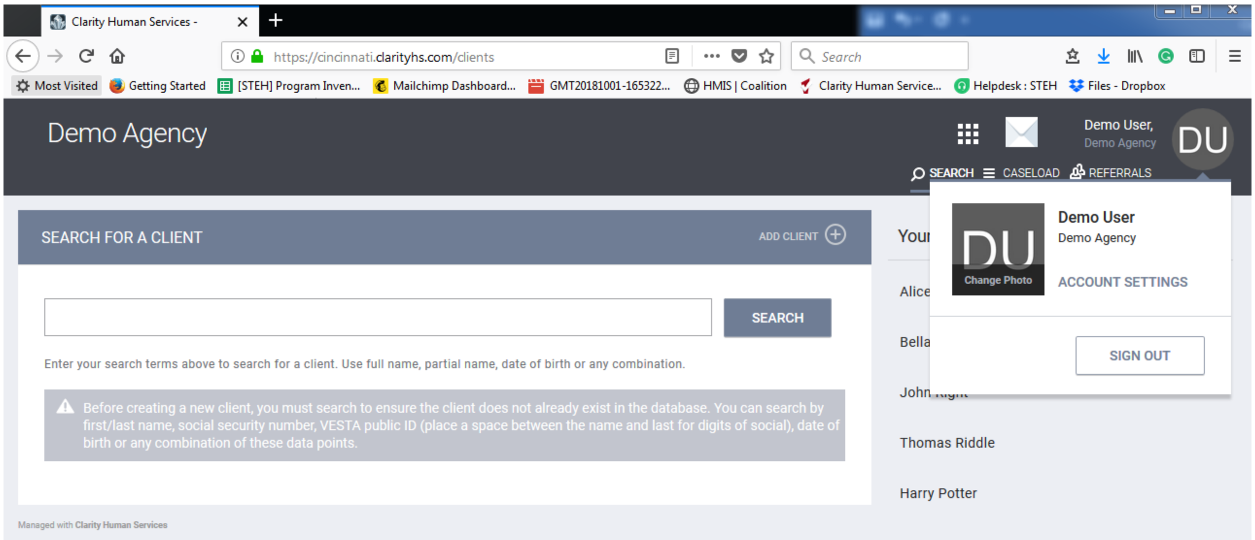
The first step is open the following login page:

https://memphis.clarityhs.com/login

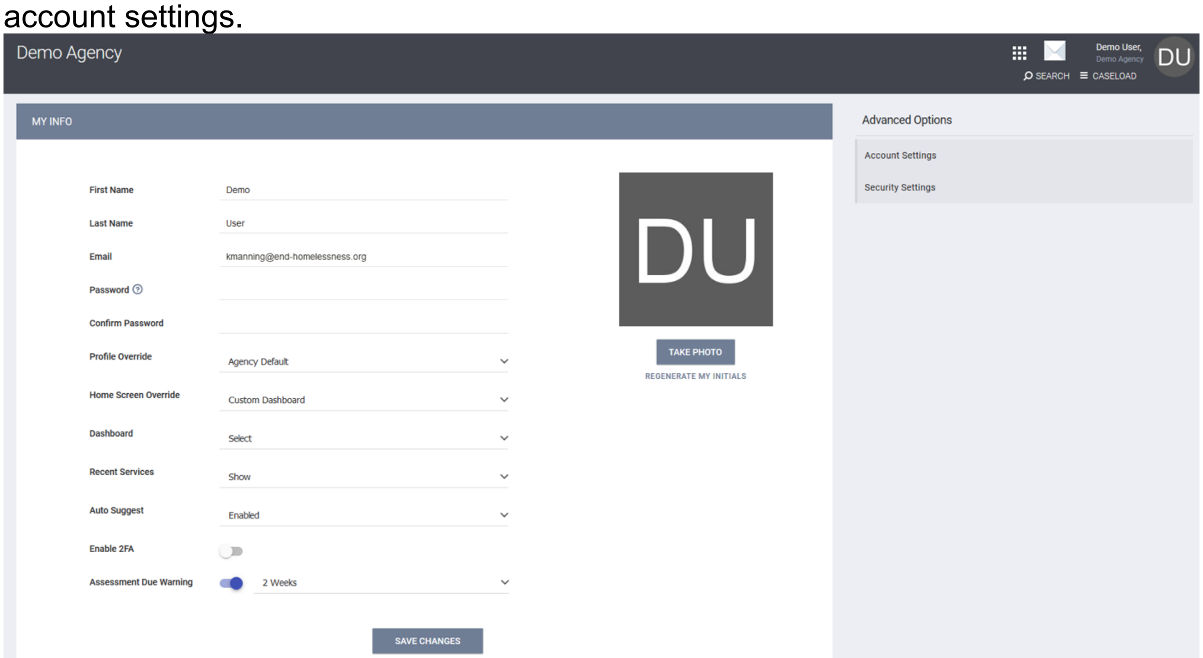
Then enter your username and password, select Sign in. Logging in will take you to the search screen, where you can begin your tasks.



3. User Profile



Click on ‘ACCOUNT SETTINGS’ to access your User Profile screen and adjust your account settings.



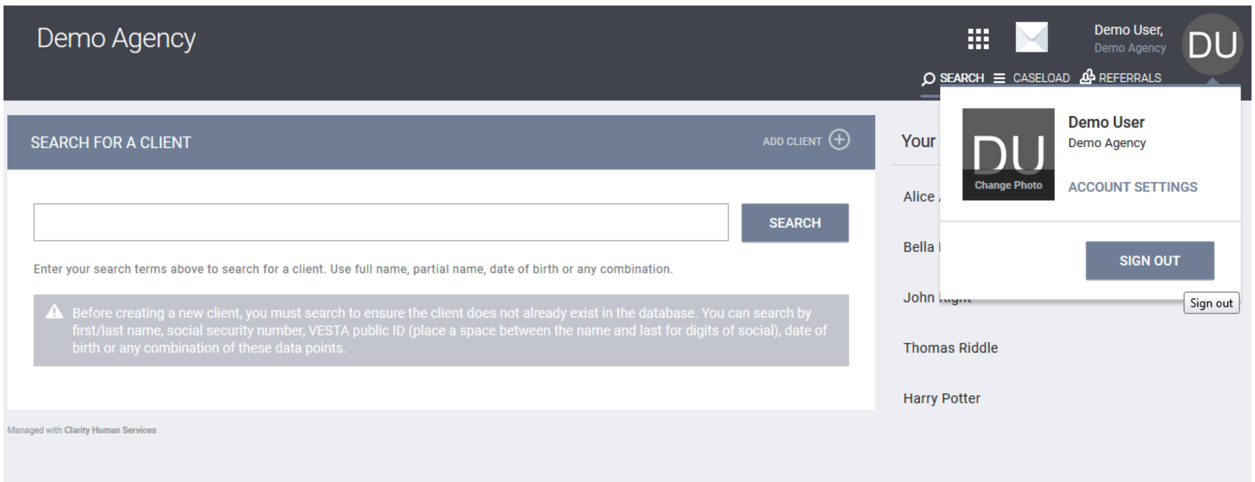
From the Account Settings you can:

- • Change/Add a profile photo
- • View/Edit account settings
- • Hide/Show recent services while working with clients
- • Enable/Disable Auto Suggest
- • Enable two factor authentication (Turning on will prompt the setup of the 2FA process at your next login)
- • Manage your Assessment Due warning

  (learn more at https://get.clarityhs.help/hc/en-us/articles/115000410987-Working-with-Your- Staff-Profile)

4. Logging Out

To log out of your Clarity session, click the Staff Profile picture in the upper right corner of the screen. Select Sign Out to end your Clarity Human Services session and log out of the system.

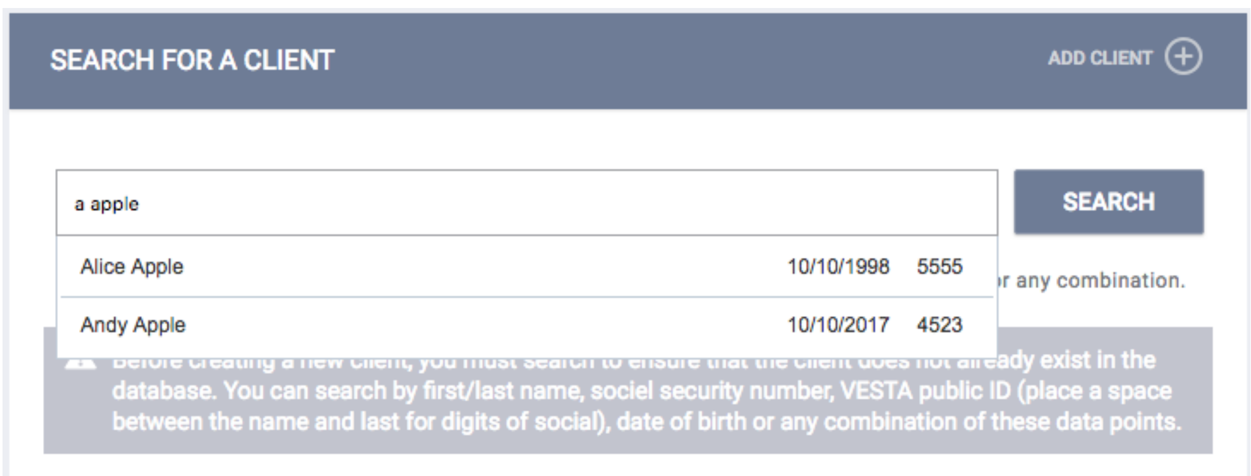


5. Searching for a Client

Before entering a NEW client, you must search to ensure that the client does not already exist in the database.

It is a good idea to enter only partial names when searching for a client.
For example, if you are searching for Michael Jones, entering mic jon in the search field makes it much easier to find the correct client. See the example below:

You also have the ability to search using the last four SSN digits or a combination of the client name and SSN (Alice 5555). Remember there is space between name and SSN

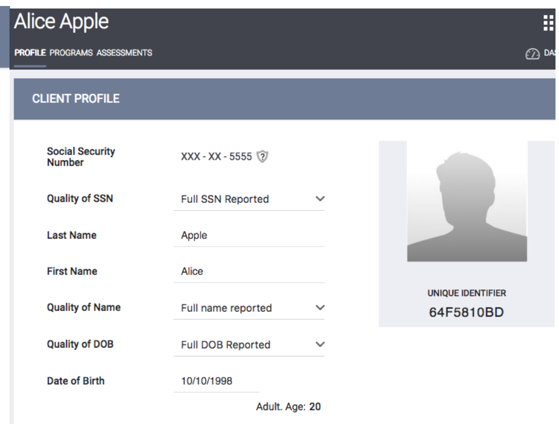


6. Adding A New Client

To select a client from your search results, mouse over the client you would like to select to produce an “Edit” option.

Click on the client “Edit”, it will take you to the client profile.

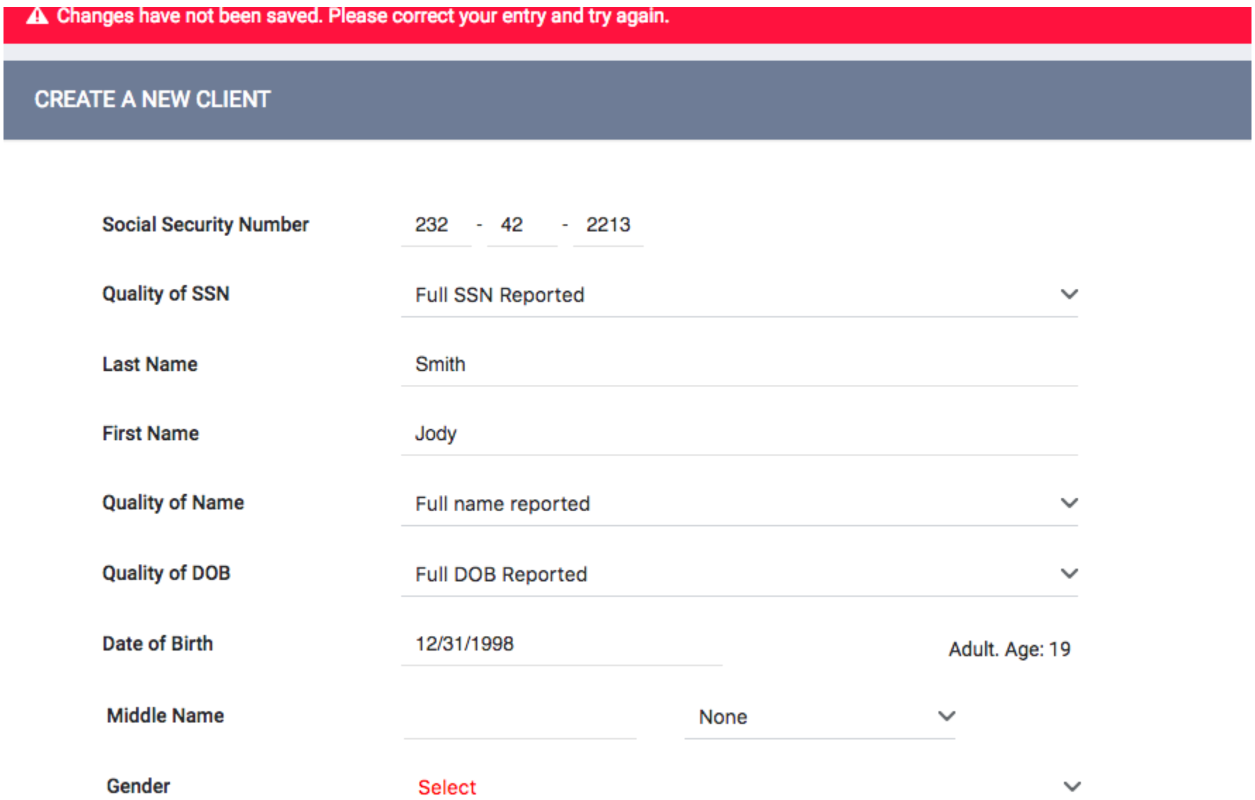
If, after a thorough search, you have determined that your client does not exist in HMIS, click “Create a New Client” in the upper right corner of the Search screen.



In this example, we are entering client Jody Smith.

Complete ALL fields on the following Intake screen with the proper responses and click “Add Record” at the bottom of the page when you are finished.

If any of the required HUD Universal Data Elements have been left blank, you will be unable to save/create the file. These fields will be highlighted in red for your attention:



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

CREATE A NEW CLIENT

Social Security Number	232 - 42 - 2213
Quality of SSN	Full SSN Reported
Last Name	Smith
First Name	Jody
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	12/31/1998 Adult. Age: 19
Middle Name	None
Gender	Select

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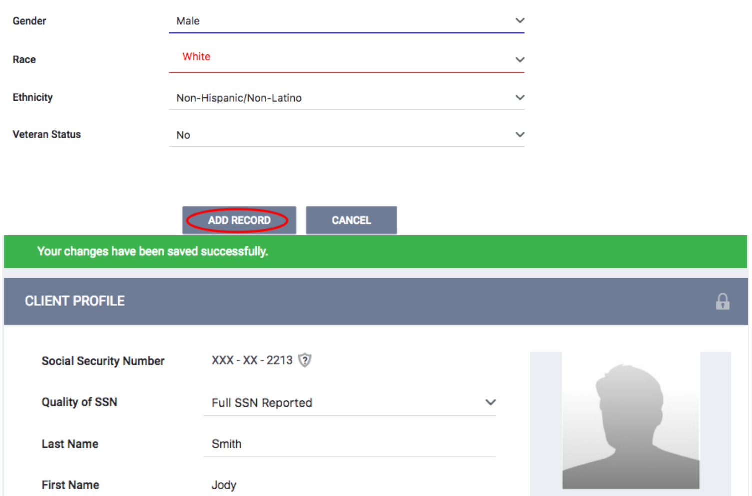
Complete the missing fields and click “Add Record” to create the file.

The top will shows “green” when you successful saved.

Please review your intake to ensure accuracy and completeness.



Don't Know/Refused/Data Not Collected:

Selecting “Don’t Know”, “Refused”, or “Data Not Collected” is acceptable and will allow you to save the file. However, each field on this screen makes up the overall data quality percentage for this client. Not making a valid selection in each field will lower the data quality for this client and impact overall data quality percentages for your agency as a whole.

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7. Release of Information

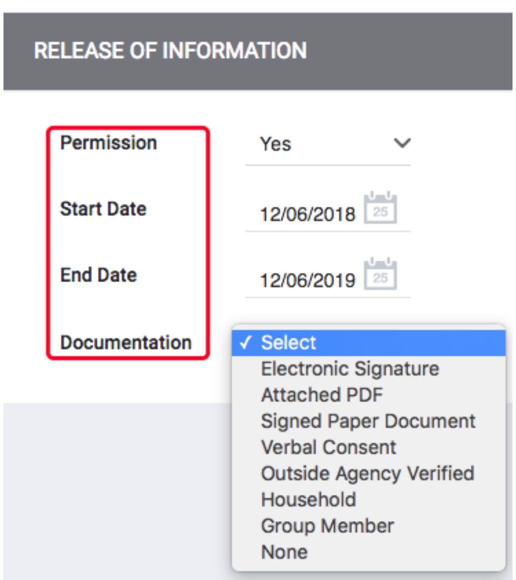
Once the Create a New Client Screen opens, the Release of Information box will be located at the top right of the screen.

A Compliance Warning ribbon will appear across the screen of any client profile that has an expired CLIENT CONSENT form, or a CLIENT CONSENT form that is about to expire. Select the ‘Click Here’ link to update the CLIENT CONSENT.

The Release of Information Screen will appear. Complete the following data fields:

- Permission

Yes = Client provided consent
No = Client did not provide consent
(the client’s data will NOT be shared outside of your agency)



- Start Date

This is the date that the client signed the CLIENT CONSENT. The “Start Date” defaults to today’s date, but it must be configured to reflect the actual date the CLIENT CONSENT was signed by the client, if it was not signed on the current day.

- End Date

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

- Documentation

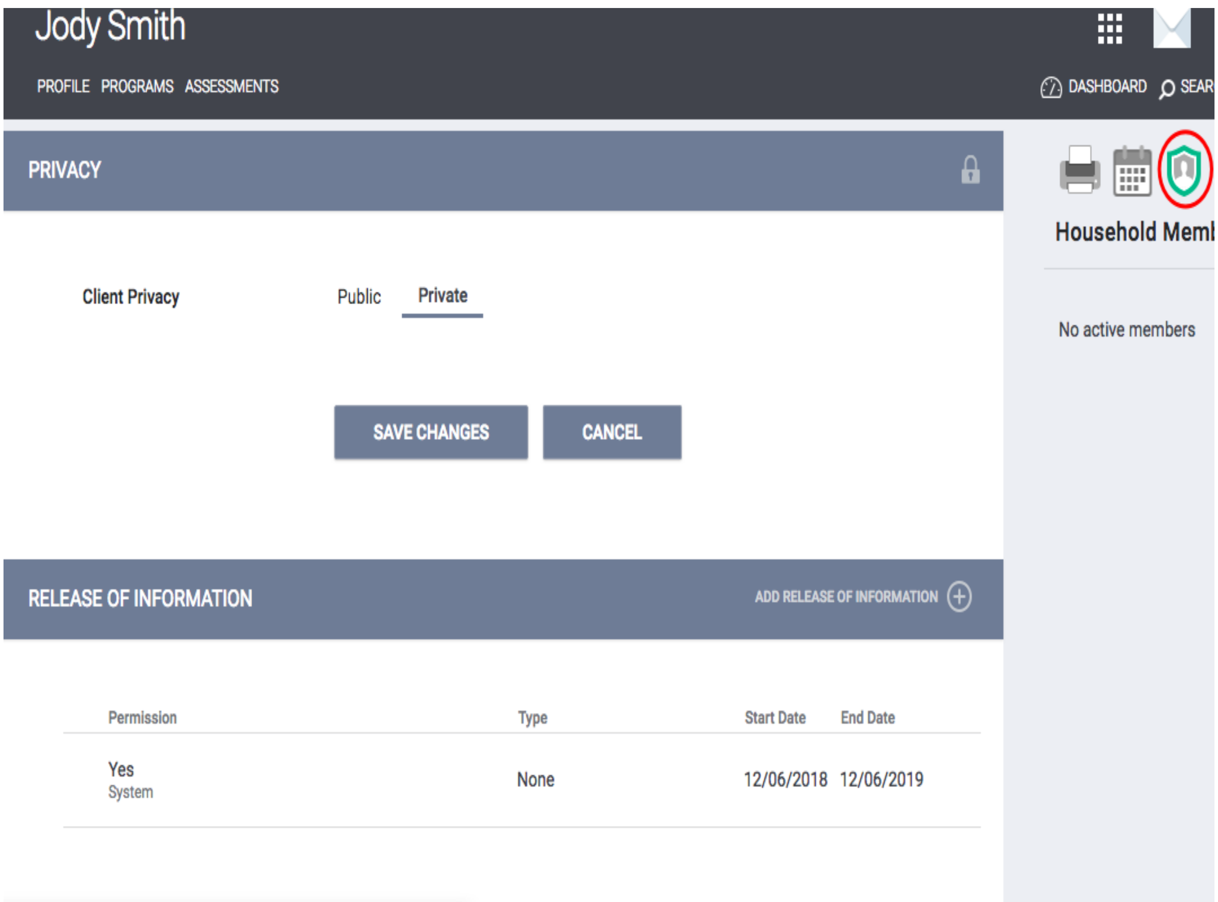
Enter the way in which the CLIENT CONSENT was stored. There are several options:

- Electronic Signature: If Electronic Signature is selected, a black button stating ‘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.
- Household or Group Member – Select if the client is a minor and an adult household/group member signed the CLIENT CONSENT.
- None – Select if no CLIENT CONSENT was obtained. • Select “Add Record” once all data fields are complete.

  To verify the form uploaded correctly, click on the “Shield” icon, next to the client calendar and print icons. This will open the Release of Information screen and you can review the form on this screen.

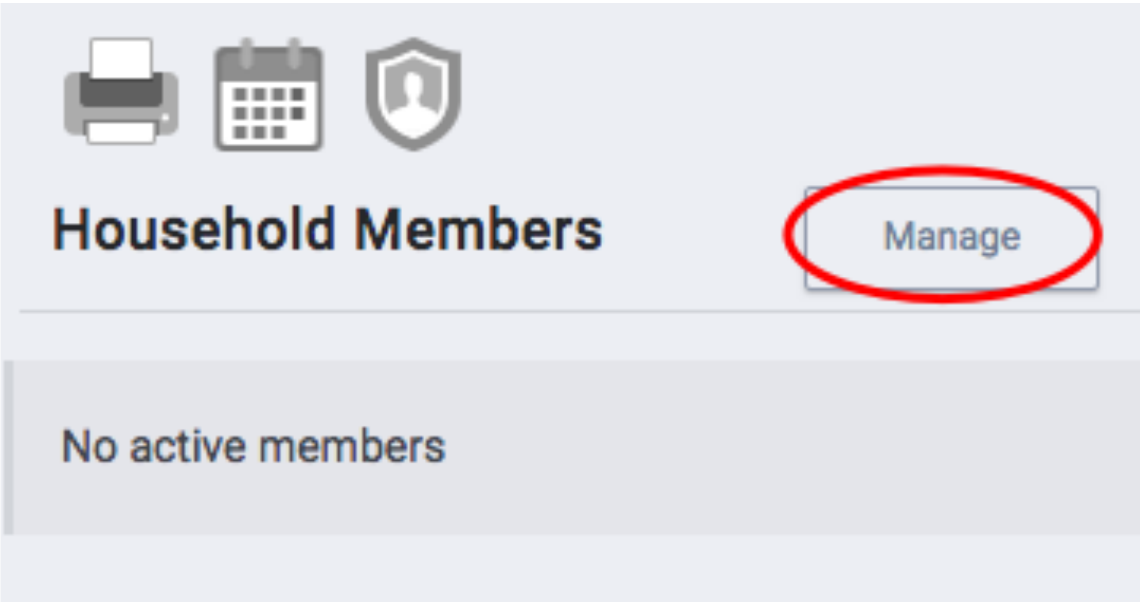
  *Note: Only one CLIENT CONSENT per agency per active start/end date range is permitted.

Once the completed CLIENT CONSENT has been uploaded, the Warning Ribbon on the client's profile will be removed, and will only prompt when the CLIENT CONSENT expires.

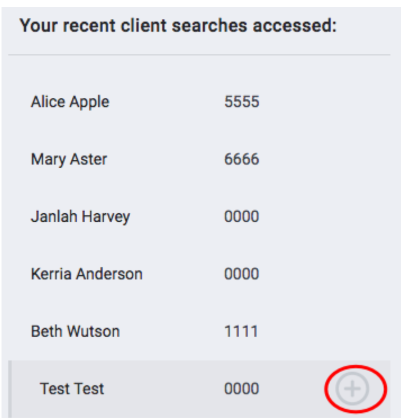


8. Creating Family/Household Groups

Open the file for the head of household. In the upper right corner, under the header "Family/Household Members", click "Manage".



If you have recently accessed the family member files, they will be listed on the right-side menu under the header “Your recent client searches accessed”. If the family member is listed there, click “Add” to add them to the head of households group.

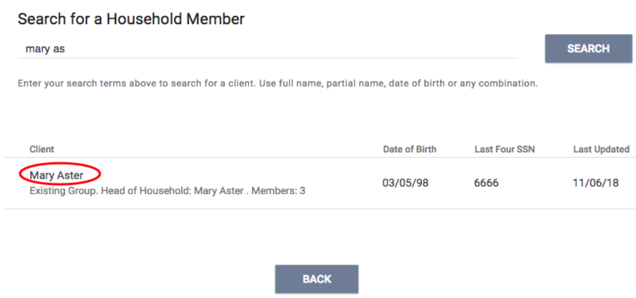


NOTE: When a listed client has “Join” as an option, that person is already part of an existing family/household group. Rather than adding them to your client’s group, you are given the option of joining your client to the existing group.

You also have the option of searching for members directly from the Family/ Household Management screen.

From the search results, mouse over the client name to produce the "Add" option.

Complete the same steps for each member until all clients are listed in the Family/Household Members section in the upper right corner of your screen.



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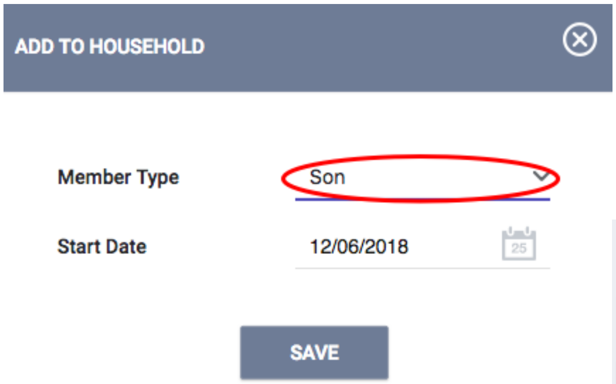
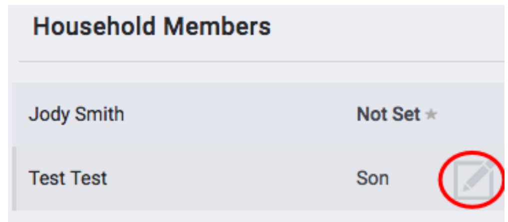
Enter the Member Type and Start Date (date the client became a member of the family/household) and click Save.

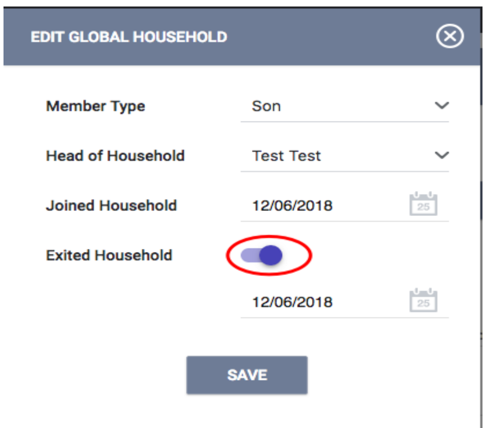
If a member leaves the household, clicking “Edit” from the Members list will allow you to enter an End Date to remove them from the group.

Select the "Exited Household" box, enter the date the member left the household, and click "Save". This will remove them from the household and retain a historical record of their time in the group.

In this example we have ended Test’s time in the household as of 12/06/18.







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9. Enrolling Clients into Programs

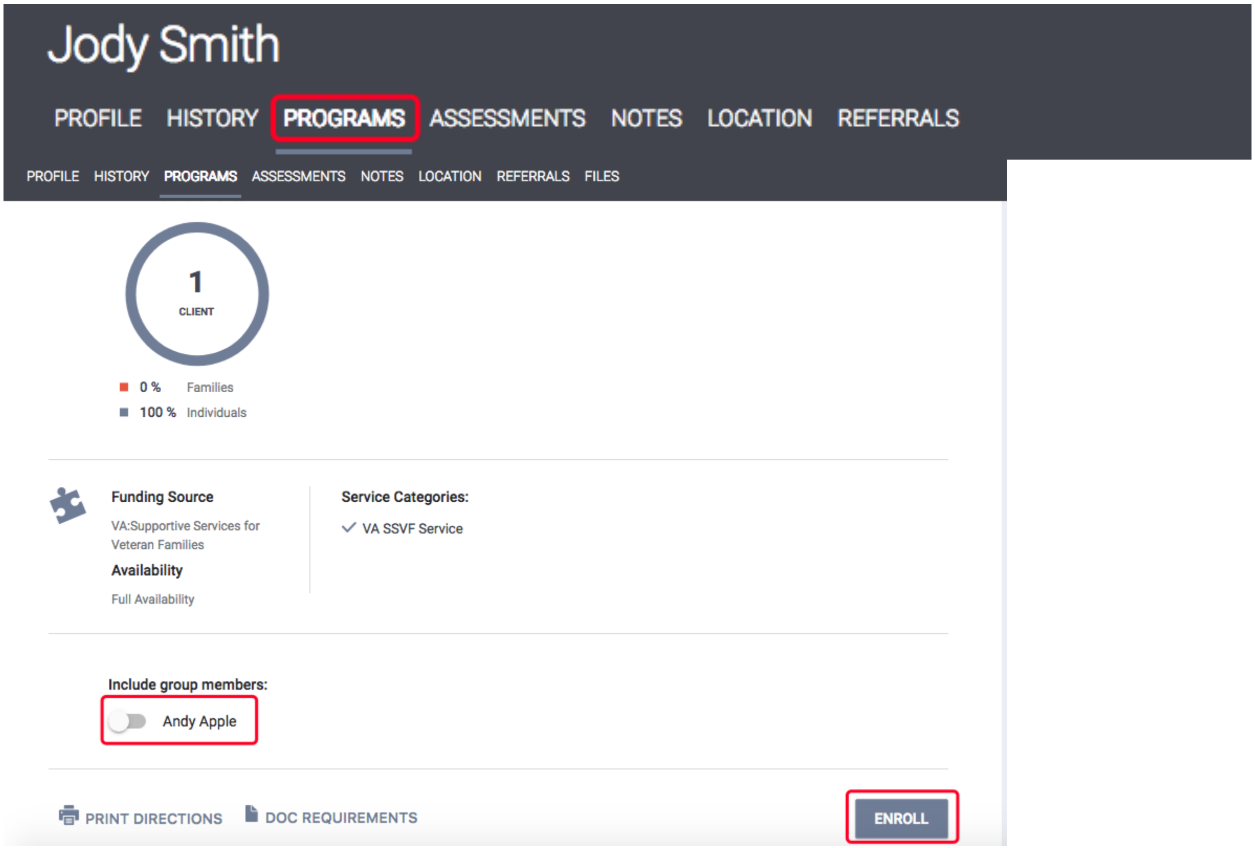
The Programs tab in the client file contains two sections:

Program History provides a listing of programs your client is either currently enrolled in or has been enrolled in in the past. – Currently available to programs with a sharing agreement between agencies.

Programs Available lists current programs provided by your agency that are available for client enrollment.

To enroll a client/household into a program, simply select the down arrow next to the applicable program title under Programs: Available.

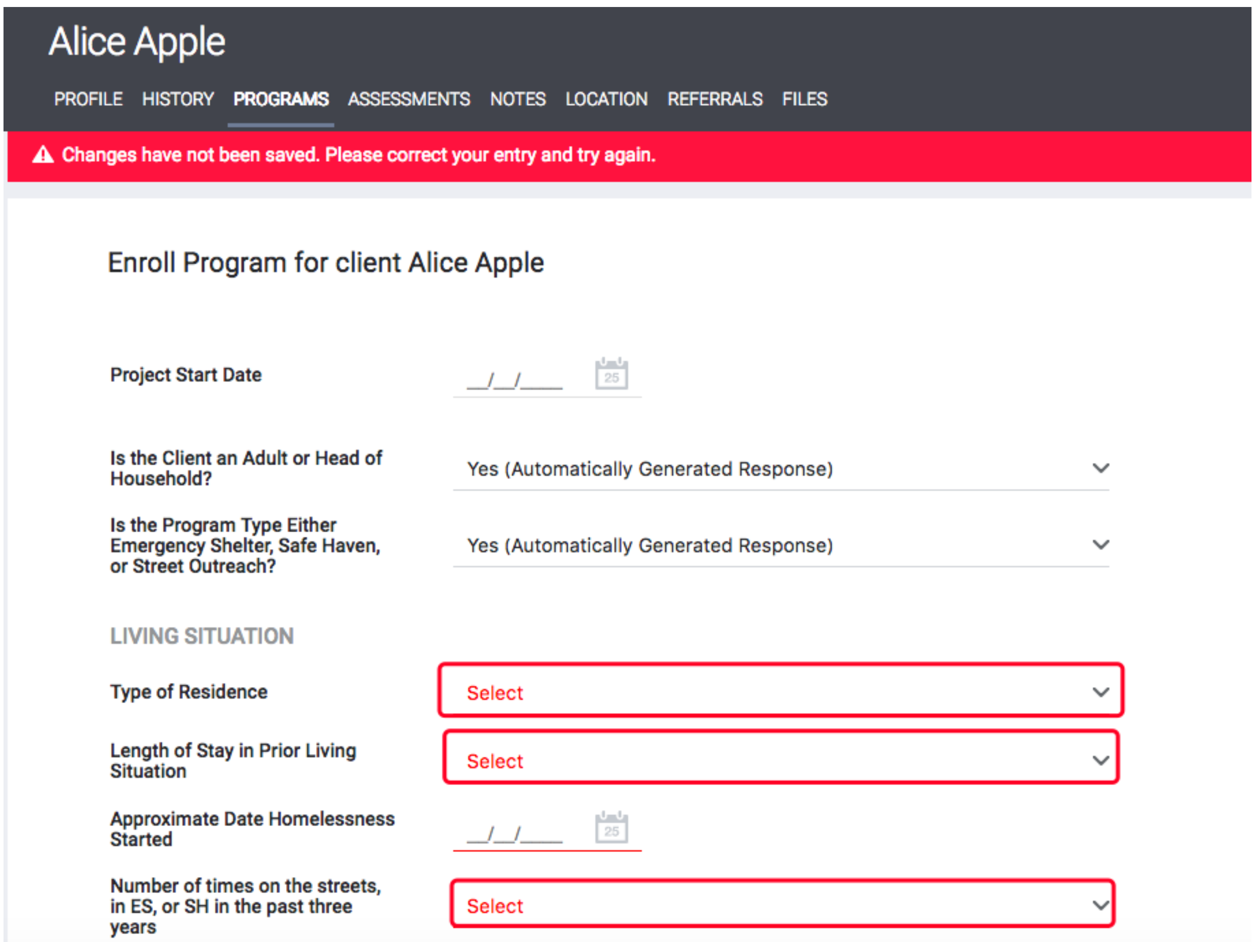
If the client is part of a group, you will be given the option to checkmark any group members who should also be included. Select the group members to include (if applicable) and click “Enroll”.



It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to the required APR for your program(s).

In the example above, required program fields were left blank illustrating required data elements in order to save the client enrollment.

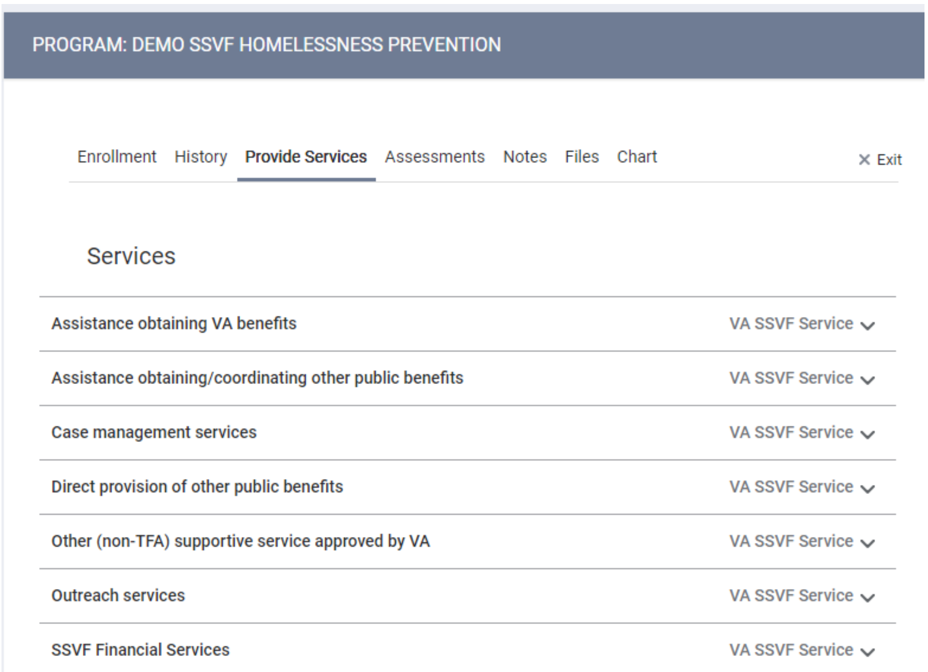
Complete ALL fields in the enrollment page for your client and click “Save & Next”. If you had check marked any group members to be included in this program, their Enrollment page will automatically come up next until each member’s enrollment has been completed. Continue to click “Save & Next” after completing each group member’s Enrollment. Enrolled group members will be listed in the right-side bar under “Program Group Members”.

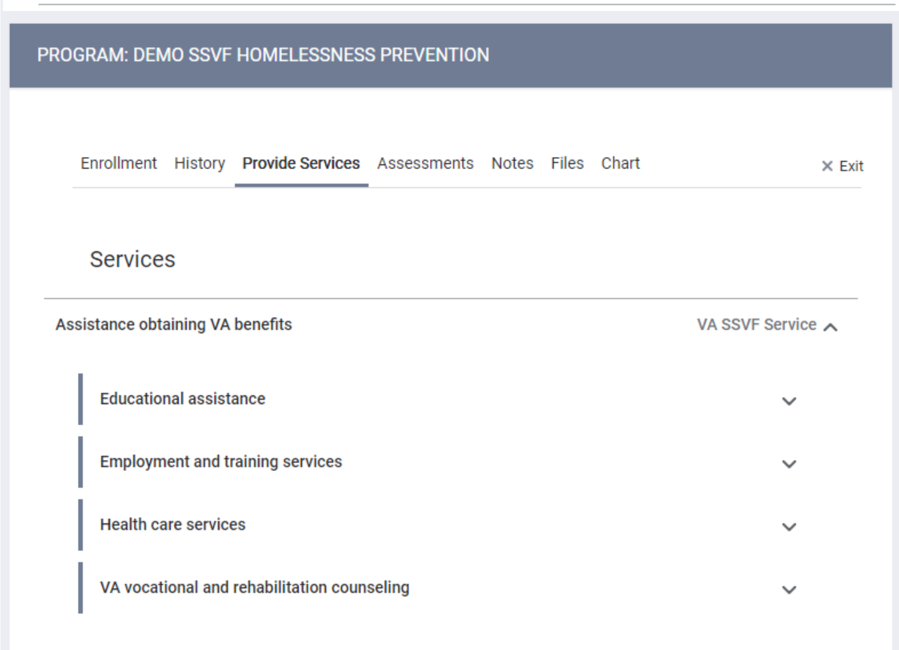


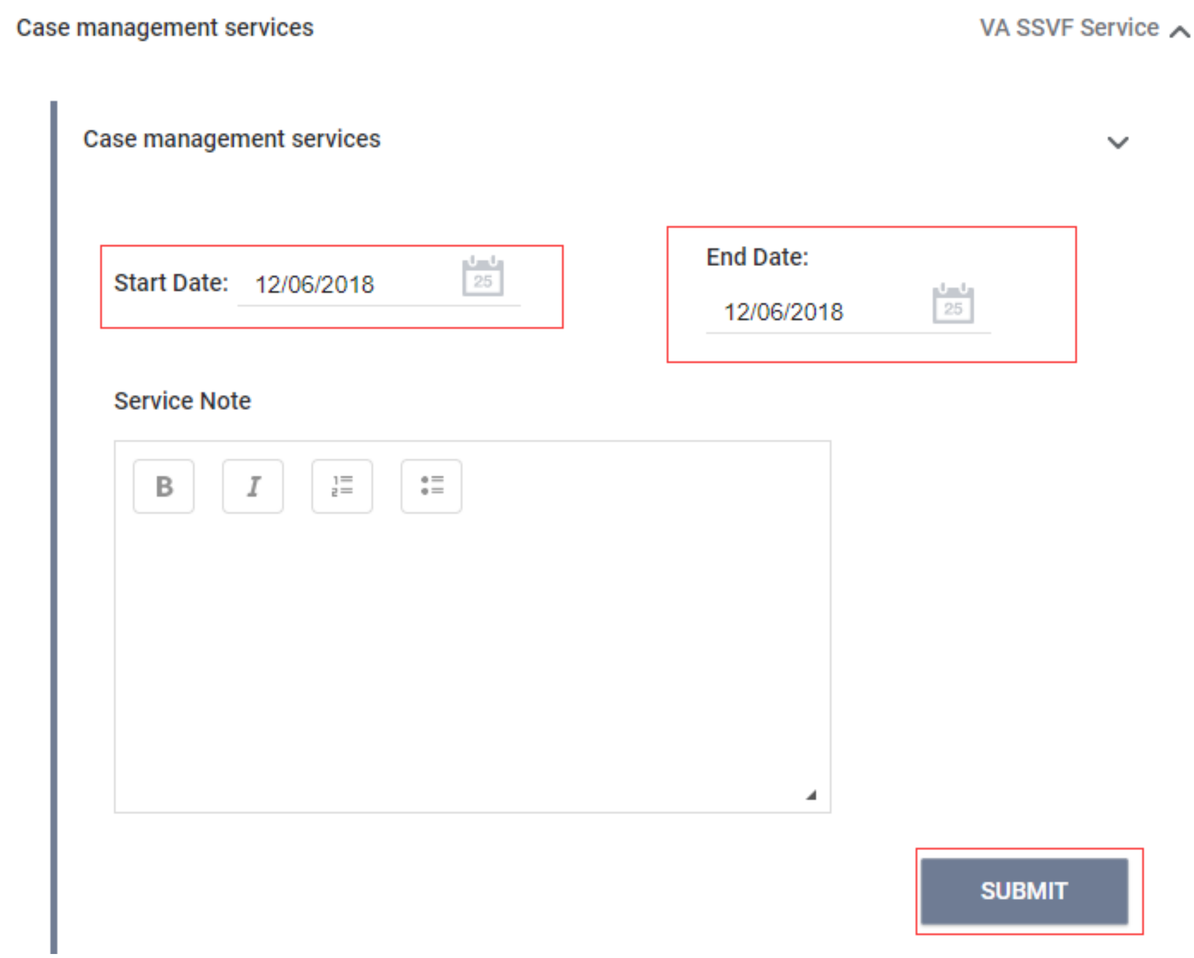
10. Program Service Transactions

When all Enrollments are complete, the “Provide Services” page will appear for your main client (head of household).

Click once on the service you wish to provide to expand the drop down.







Enter the Start and End Date (the service end date will always be the same as the start date) and any notes associated with the service. You can also enter expenses associated with the and verify the funding source service (when applicable).

Click “Submit” to complete the service placement. In this example we have provided only the head of household with Case Management.

Continue providing the client with any additional services that are being provided via this program by following the above steps.

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When you have finished, both the program enrollment and associated services should be visible from the Client Level History screen (available with an interagency sharing agreement):

HISTORY

Advanced Search Options View

Service Name	Start Date	End Date
Case Plan Demo Agency		12/20/2018
Rental Assistance:Full Rent Payment Demo Agency	12/20/2018	12/20/2018
Rental assistance:Rental assistance Demo Agency	12/20/2018	12/20/2018
Education services:Education services Demo Agency	12/20/2018	12/20/2018
Case management:Case management Demo Agency	12/20/2018	12/20/2018
Demo Shelter Diversion Demo Agency	11/27/2018	Active
Demo SSVF Rapid Re-Housing Demo Agency	11/08/2018	Active

Services should be visible from the Program history screen.

Enrollment History Provide Services Assessments Notes Files Chart ✕ Exit

Program Service History

Service Name	Start Date	End Date
Case management services:Case management services Demo Agency	12/06/2018	12/06/2018

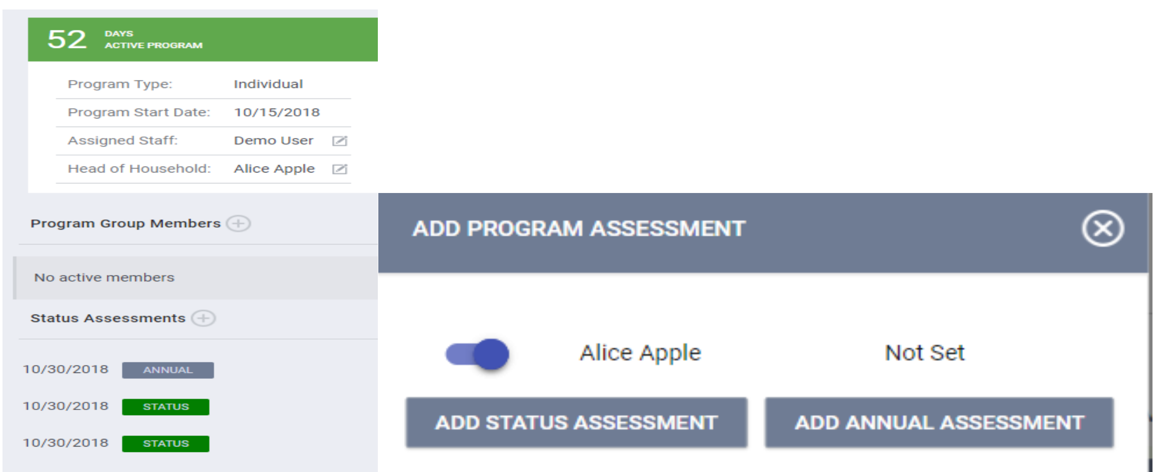
If future services are provided as part of this program, return to the Program tab in the client file. The active program will be listed. Mouse over and select “Edit”.
Select “Provide Services” and follow the above steps for Placing Services.

11. Completing Assessments

Depending upon the funding source for your program, you may be required to complete Status and/or Annual Assessments at regular intervals for all active clients. These are generally completed every 90 days (for Status Assessments) or once per year (for Annual Assessments). Please check your contract for specific requirements.

From the Programs tab, the right-side menu contains the header "Program Assessments". Click "Add" to complete a new Status Assessment or Annual Assessment.

If this is a group case, you will be prompted to select which household members you would like to provide an assessment for. In most cases this will be all members.



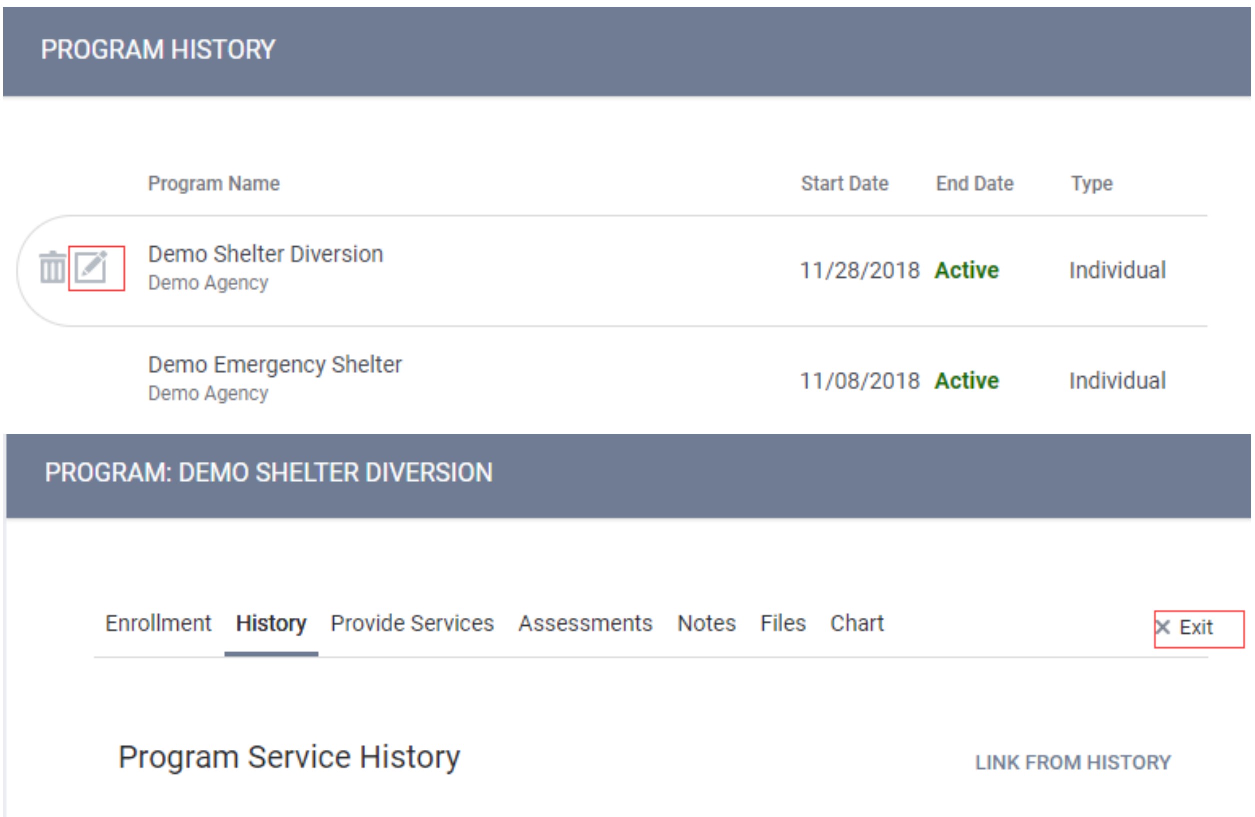
Select "Add Status Assessment" or "Add Annual Assessment". Complete all data fields on the Program Status screen and be sure to enter the correct date the assessment was conducted. Click “Save & Next” when you are finished. If this is a group case, additional members’ assessment/program status screens will appear until each has been completed.

Completed assessments can be viewed and/or edited from the right-side menu.

12. Exiting Clients from Programs

All clients must be properly exited upon completion of the program.

From the Programs tab in the client file, find the program you wish to add a household member to and simply click Edit to the left of that program to access.



Complete ALL data on the End Program screen.

Entering full exit data for all clients is extremely important to reporting outcomes for your programs and community.

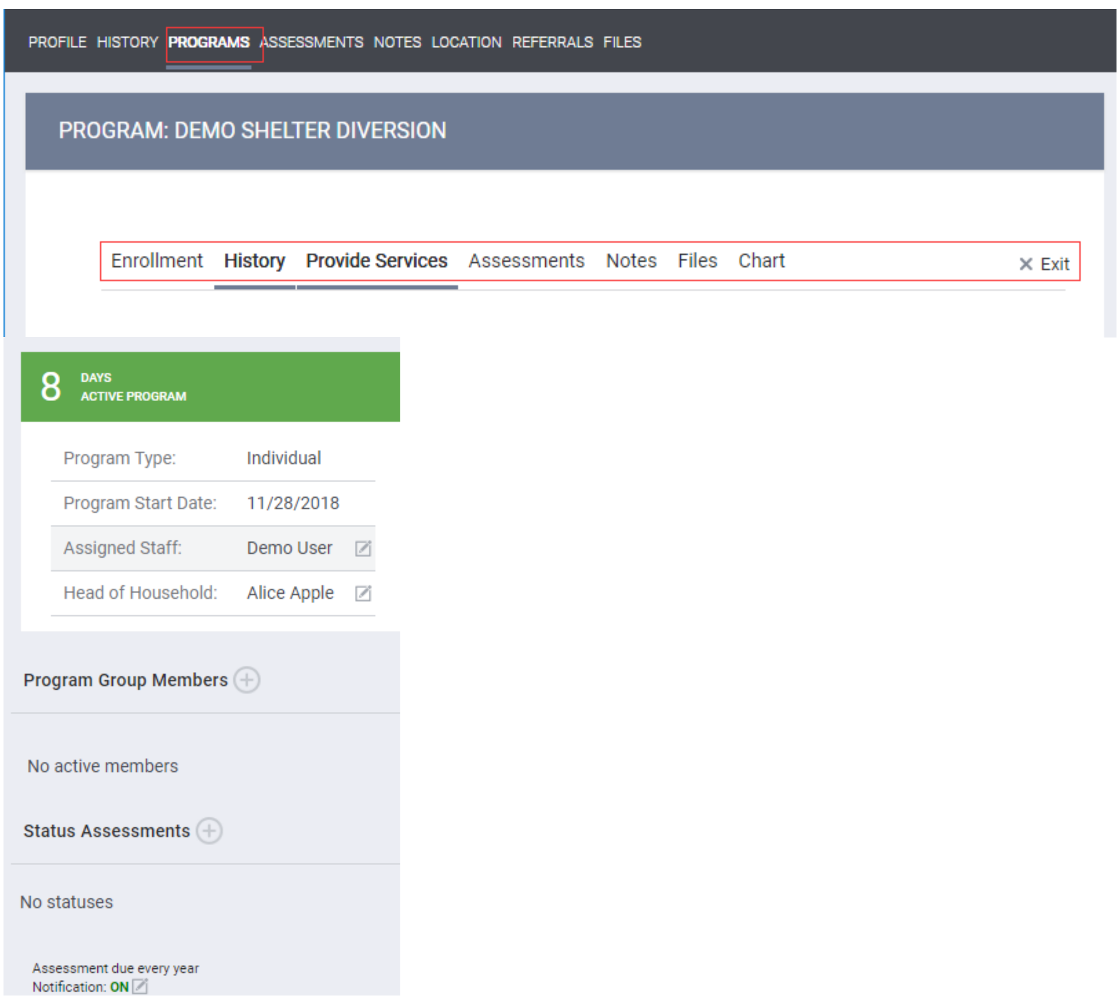
13. Program Tab Overview

- Enrollment – opens the enrollment screen that was completed at entry
- History – history of client's services associated with the program with the option to edit
- Provide Services – allows placement of services associated with the program
- Assessments - option to view/edit or add status and/or annual assessments

Right side menu of the Program page:

Current program status, type and start date.

List of current group members with option to add new members or edit existing.

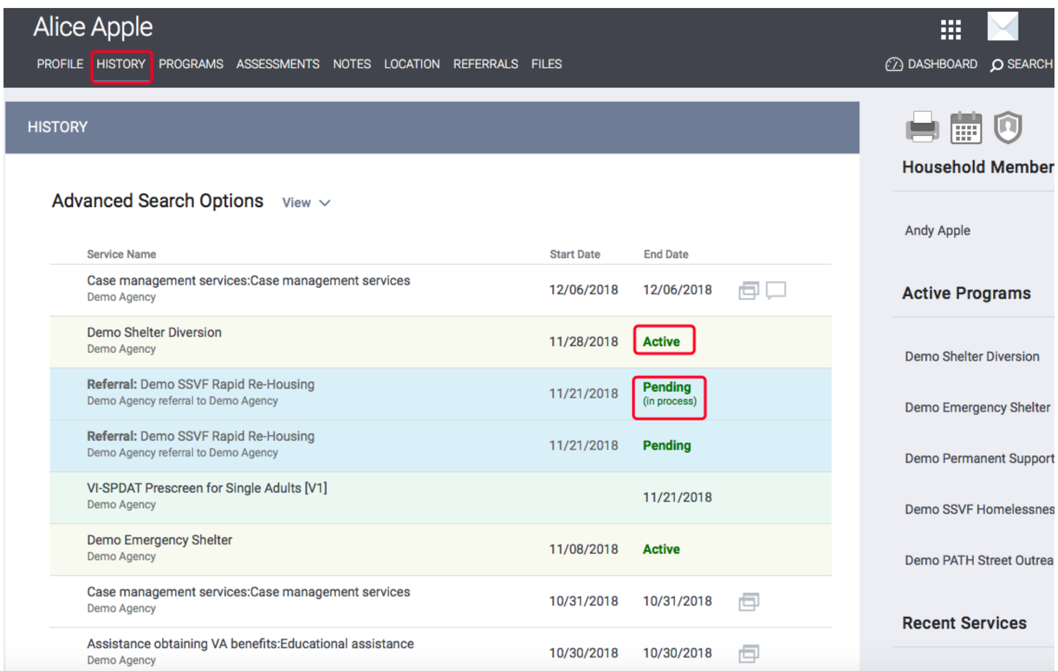


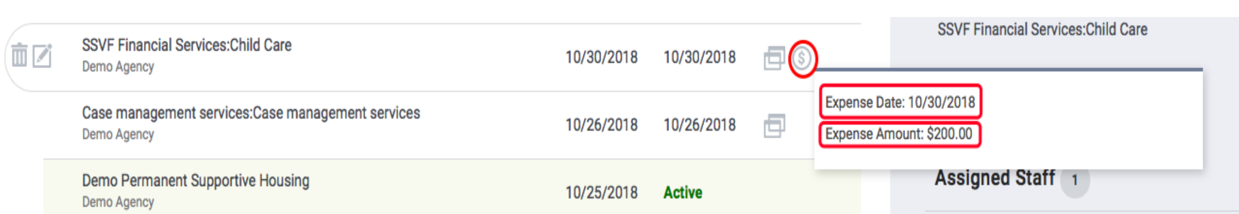
14. History Screen Overview

The History screen provides a complete look at Services and Programs that the client has participated in, while also allowing the ability to edit items provided by your agency.

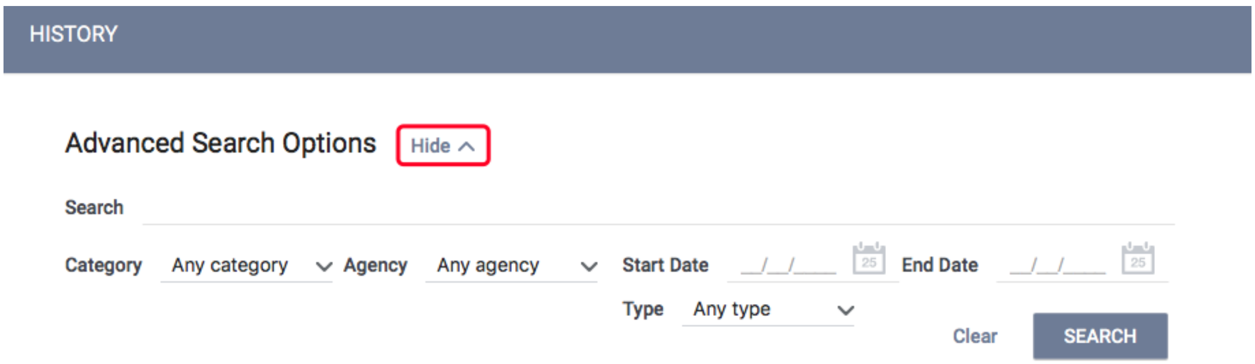
Programs the client has been or is currently enrolled in will appear in a light olive-green tone to separate them from regular service transactions.

Service transactions with attached expenses are marked with a comment icon at the right of the listing. Hover your mouse over the icon, and additional financial details are displayed. This includes the total expense amount, and the funding source the expense was applied to.





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 allows the following criteria:

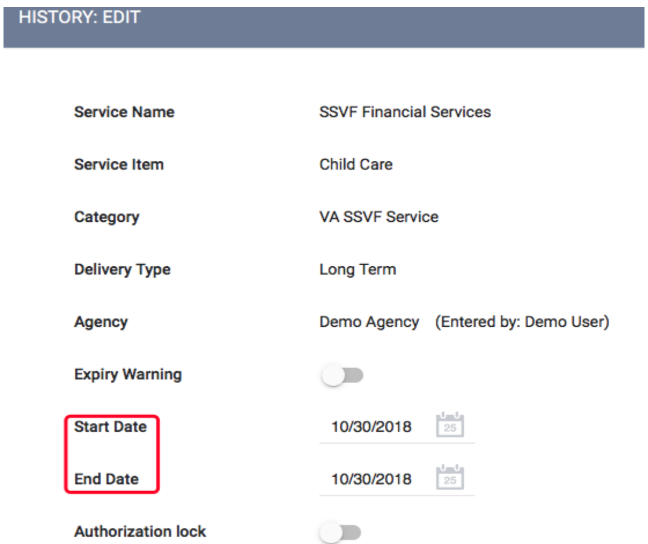


- Name – Filter for a keyword within the service title
- Category – Filter for a specific category of service using the convenient drop-down
- Agency – Filter for a specific Agency that provided the service
- Date Range – Filter based on a specific date range of service provision

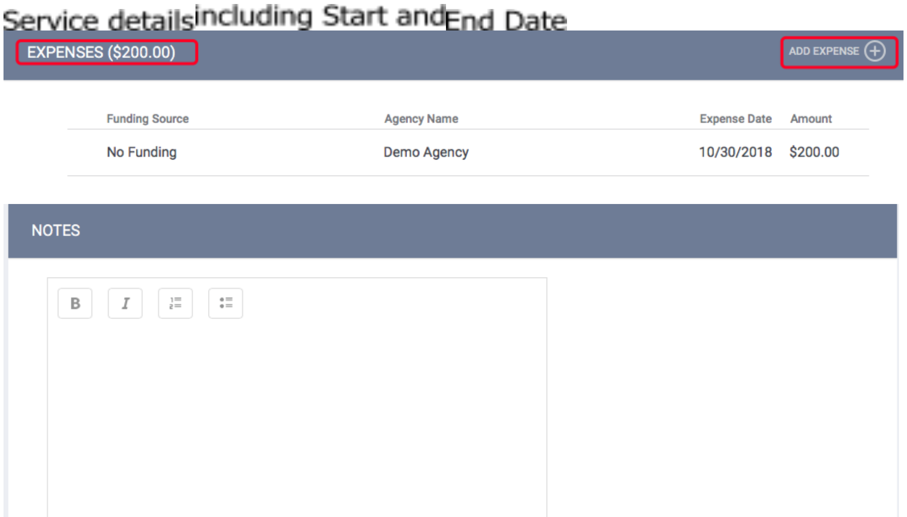
By clicking Edit to the left of a service name you will be able to add service notes, adjust dates, add additional expenses, and add household members. Clicking Edit on a Program will place you directly into Program management.

The Edit screen contains the following:

Expenses associated with this service



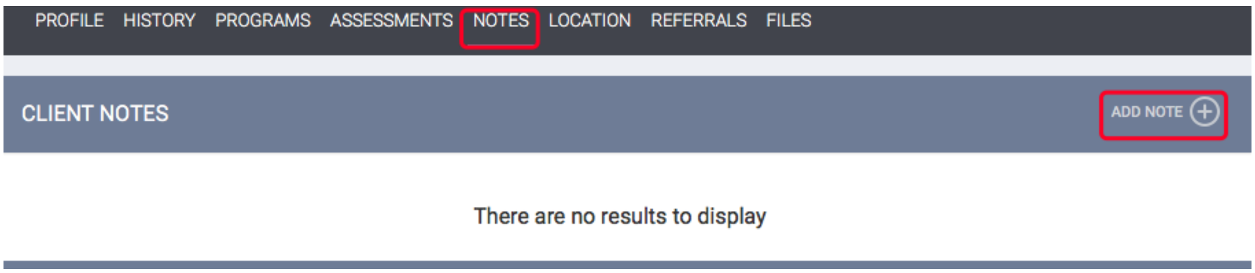
Service details including Start and End Date



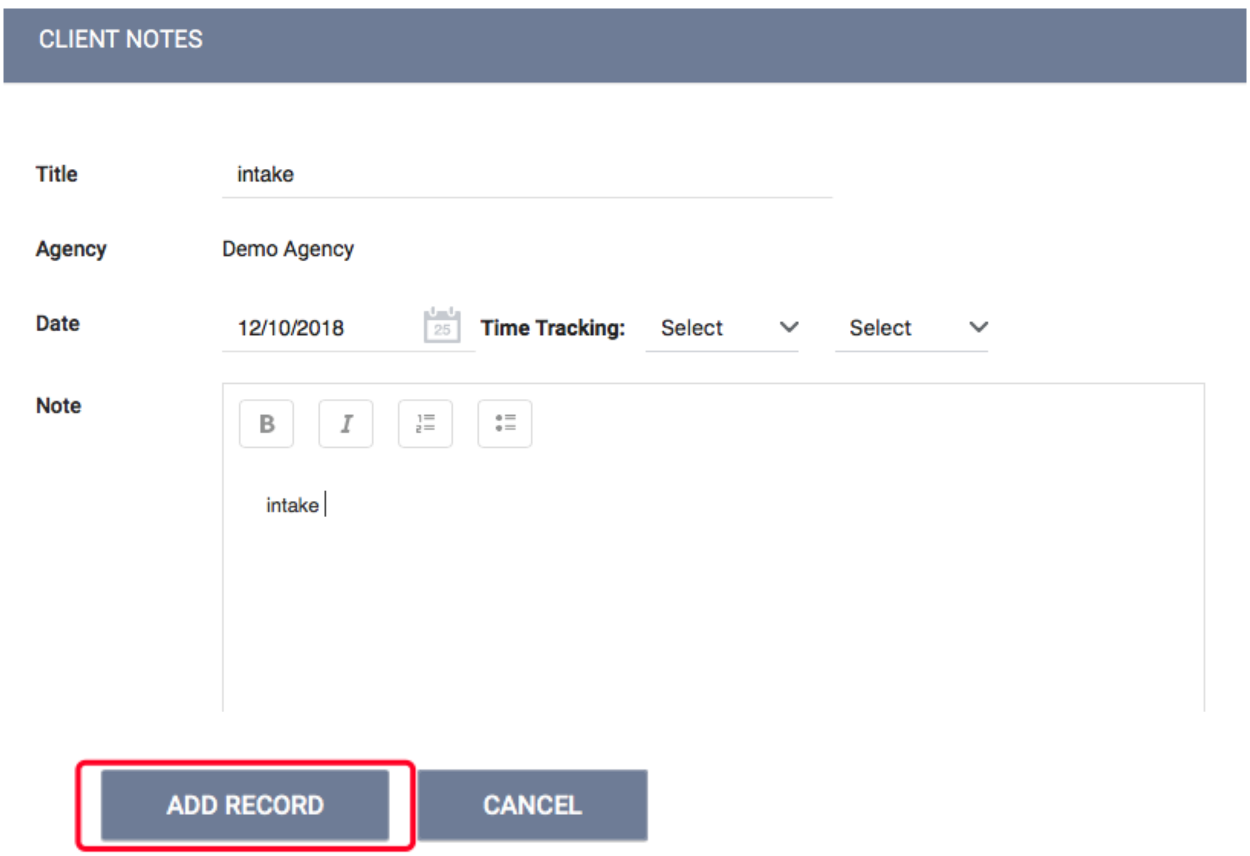
Option to add notes to this service

15. Case Notes

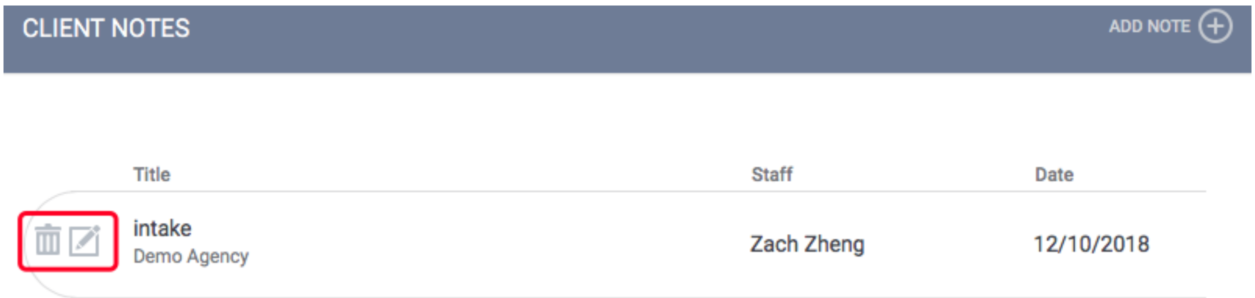
To add a case note, click on the Notes tab in the client file. In the upper right corner, click on “Add Note”.



Enter the Title, Date and Body of your note and click “Add Record” to save.



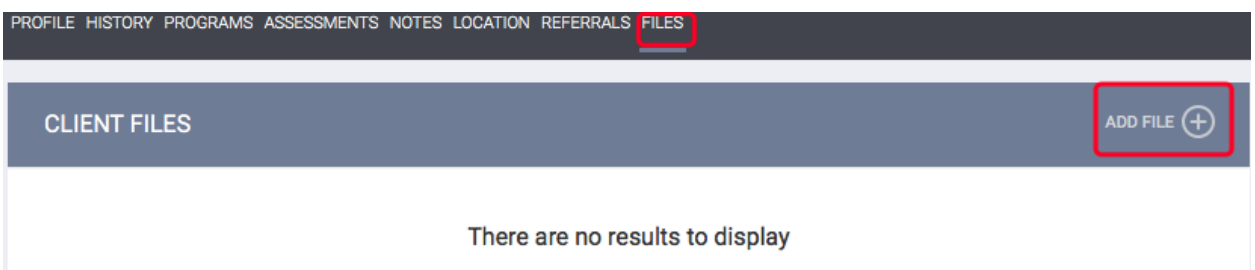
Saved case notes will be displayed by date. Mouse over to open/edit.



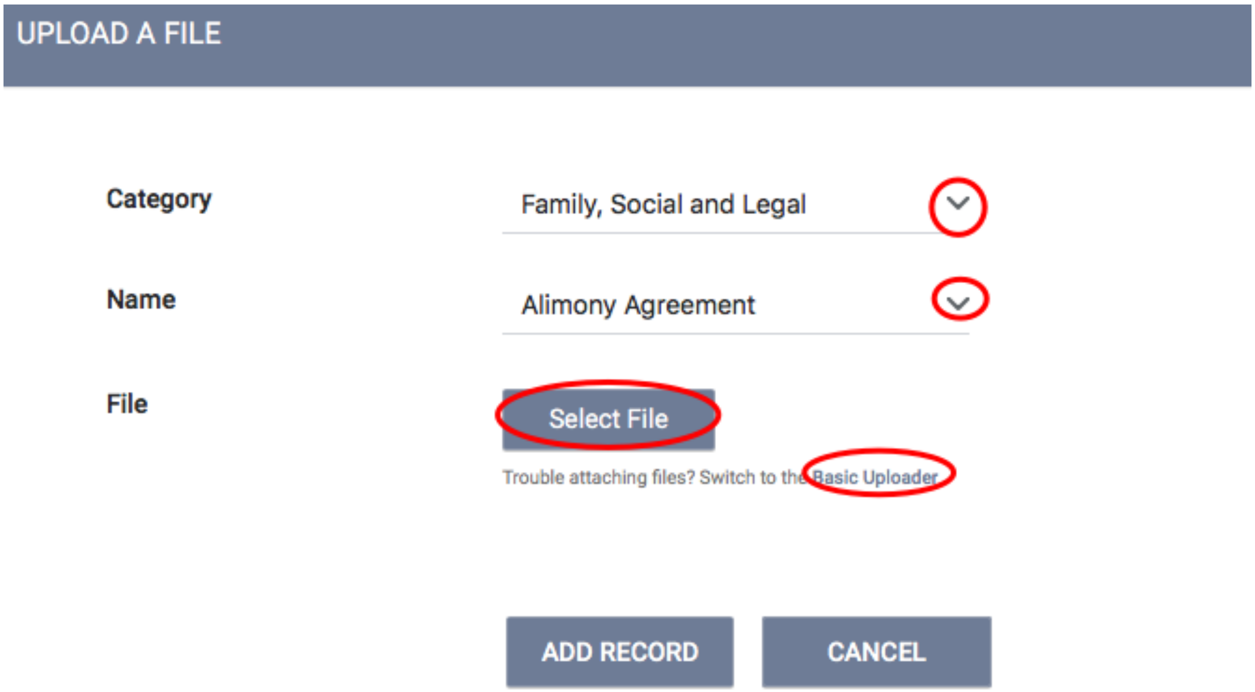
16. Uploading Files

NOTE: This section will assume you have previously scanned and saved documents into separate files that are accessible through your computer.

Click on the Files tab in the client's record to open the Client Files page. Then click "Add File" in the upper right corner.



Select a category and name from the drop-down menus that closest resemble the type of file you are uploading.



By clicking “Select File” you are using an advanced upload to select the file from your personal computer. If your system is not compatible with the advanced upload, you can choose the Basic Uploader.

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.

You can view the existing file simply by clicking View, or edit the document by uploading a new version.

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

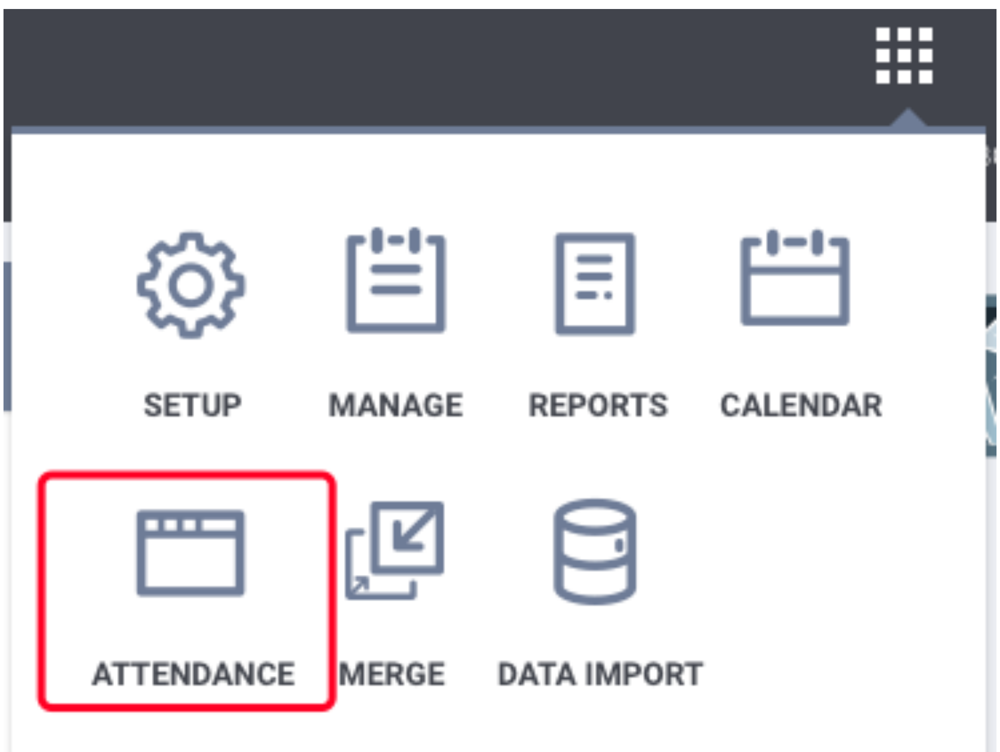
17. Daily Attendance Service Transactions

Daily Attendance is used for services provided on a day-by-day basis, allowing a large number of clients to be checked in for service very quickly.

Services that require daily entry, such as Emergency Shelters, are entered in Clarity HMIS using the Attendance button located in your launcher.

NOTE: You will only have an Attendance button in your launcher if your agency provides services that have been setup for daily intake.

After clicking on the Attendance button, a list of services available for daily intake is provided.



ATTENDANCE

Service Name	Category
Case management: Case management	Case Management
Education services: Education services	Education
Outreach Contact: Not Staying on Streets, ES, or SH	Outreach Contact
Outreach Contact: Staying on Streets, ES, or SH	Outreach Contact
Outreach Contact: Worker unable to determine	Outreach Contact
Rental assistance: Rental assistance	Rental Assistance

6 Services

Select the appropriate date using the calendar icon at the top of the screen.

CASE MANAGEMENT: CASE MANAGEMENT

Date 12/10/2018 25

Monday, December 10th, 2018

Manual Scanned

In Attendance

Client Name	Last 4 SSN
Right, Joe	3123

Clients from last 4 Months

Client Name	Last 4 SSN	
Right, John	0000	Add

There are two columns on the Attendance screen:

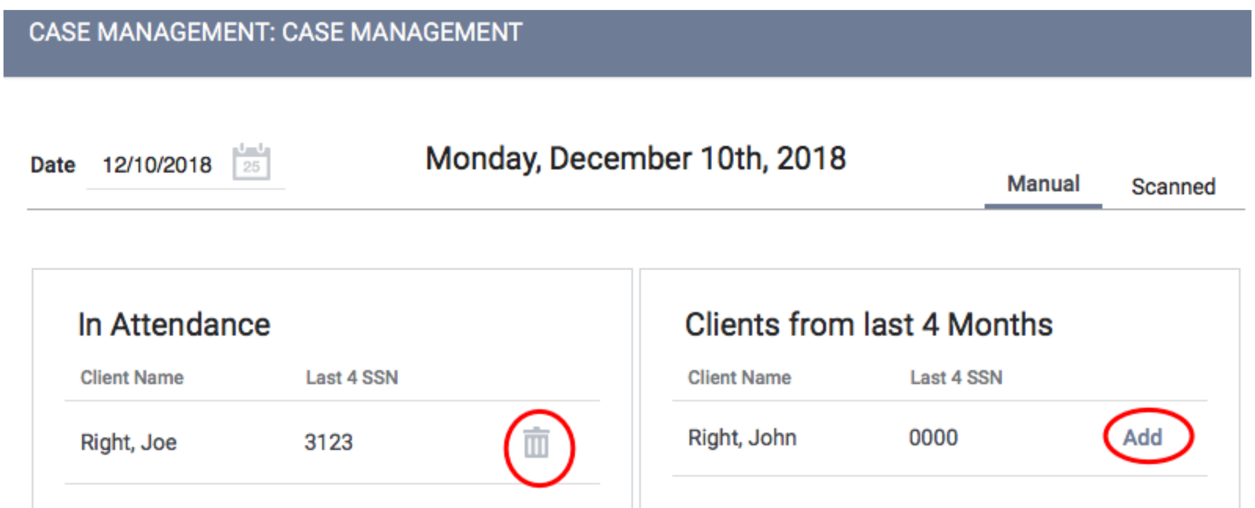
- In Attendance (left column) - all clients currently in attendance for the date selected

- Clients from last 4 months (right column) - all clients who have been in attendance at least once during the last 4 months.

Using the roster of Clients from the last 4 months, click "Add" to place any returning clients into attendance for the selected date.

As you "add" clients, they will be moved from the 4-month roster to the "In Attendance" roster on the left.

You can easily remove a client from attendance by clicking on the trashcan icon in the Attendance roster. This will remove the client from attendance and return them to the 4-month roster on the right.

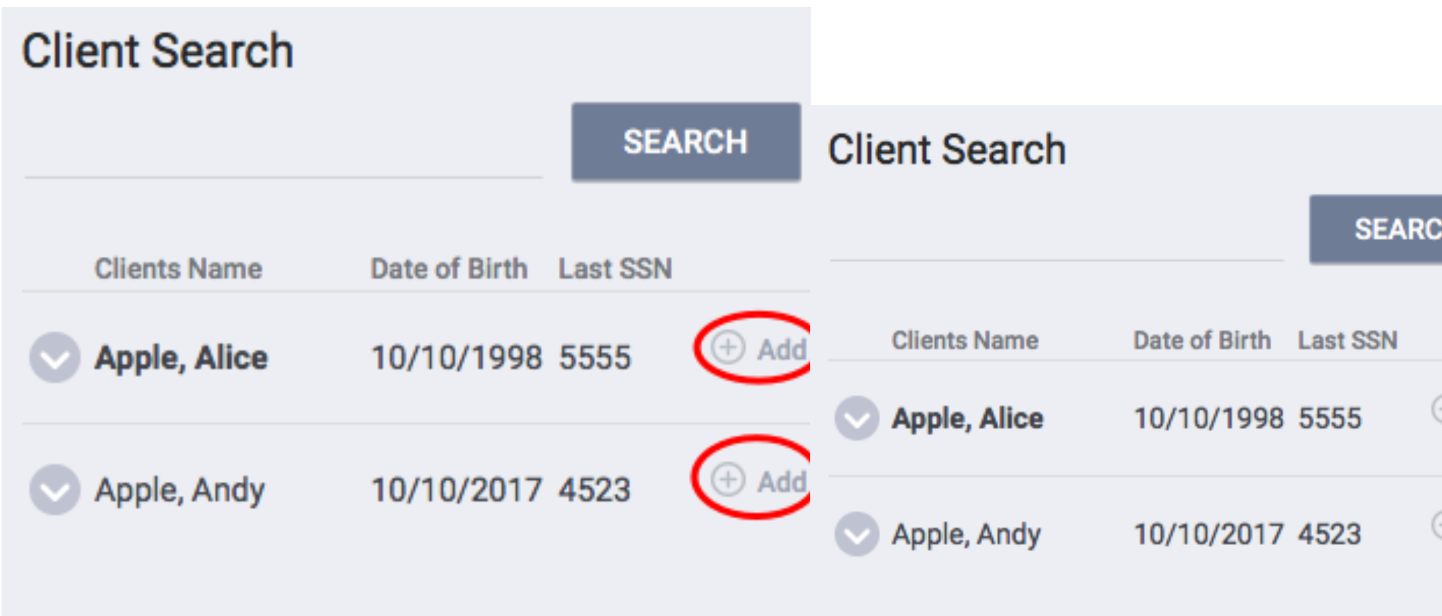


To check in clients who have not been in attendance during the last 4 months you will use the Client Search located in the upper right corner of the Attendance screen.

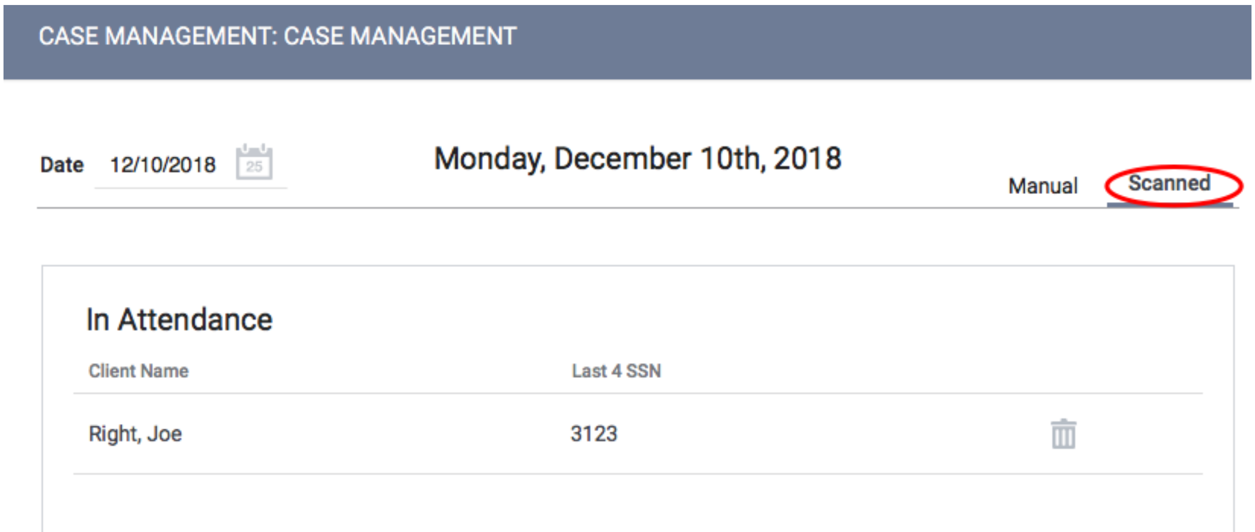
In the search results, click on the + symbol (if applicable) to display all family/ household members.

Clicking “Add” directly from the search results for your client and any applicable group members will place them with the service and add them to the “In Attendance” roster.

NOTE: Clients who are not found in your search results do not exist in HMIS. Please follow the steps for “Adding A Client” found on page 4 to create a file for your client prior to attempting to place them into attendance for services.



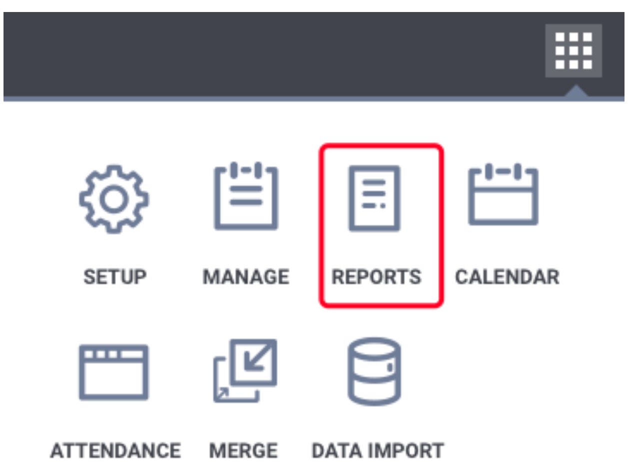
If your agency is using a scanner to enter clients into service, use the Scanned button to upload your data file.



18. Reporting

Accessing the Report Library

To begin using the Report Library, find the Reports Button in your launcher.

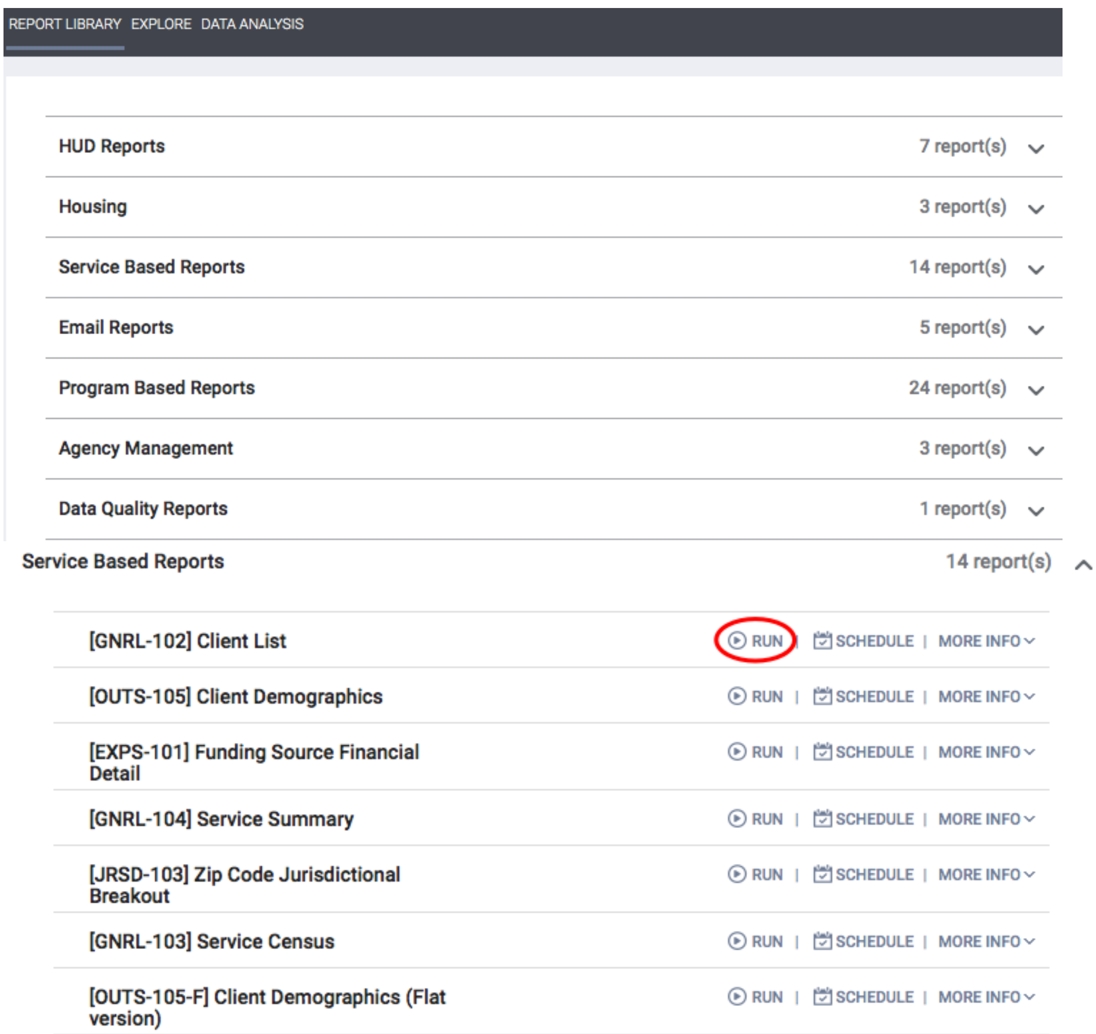


This will bring you to the Report main screen, which is divided into several sections according to report type, with Show/Hide features for easy organization.

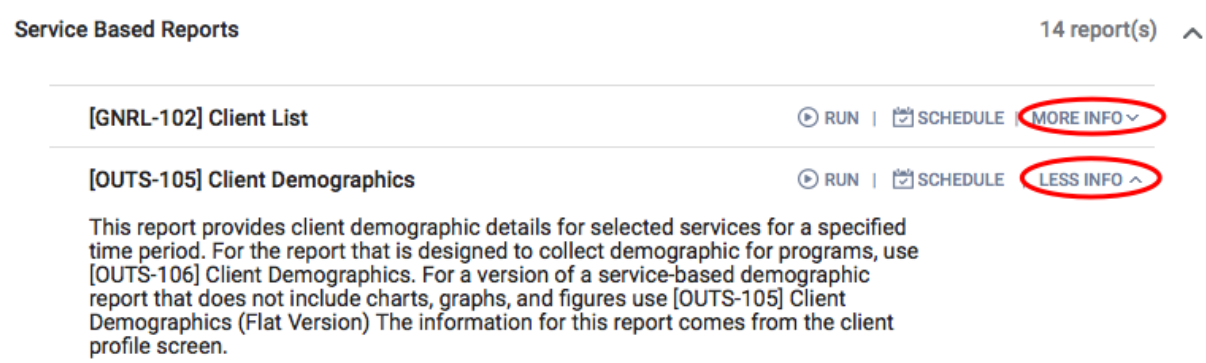
The report section will expand to make the reports within that section available. Select the ‘up’ arrow to minimize the screen to its normal size.

For more information on a particular report, select the “More Info” link. The screen will expand to include a summary of the purpose of the report.

To run a report immediately click “Run.”

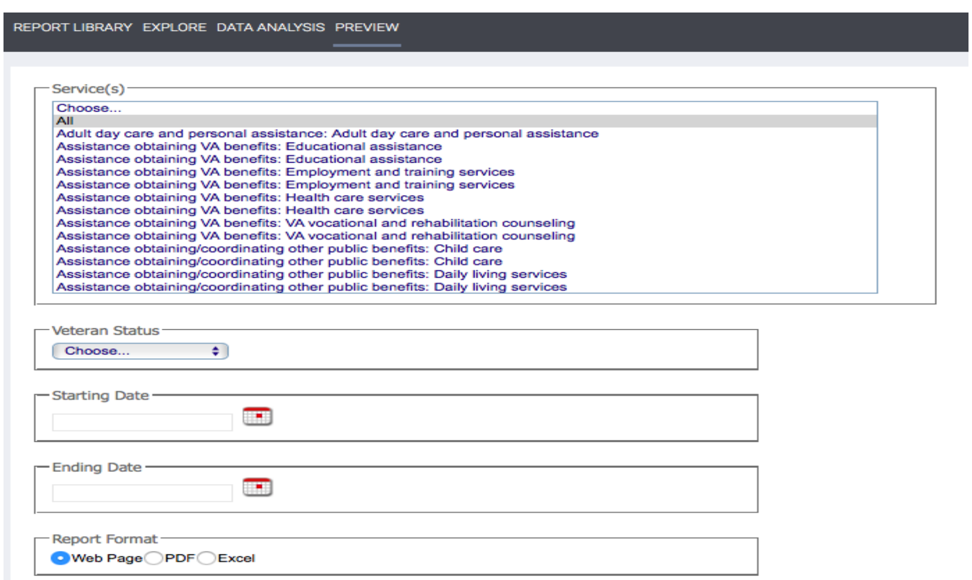


To review more information, click “More Information”



This will take you to the Preview page. Here you can select the parameters for each report. Because each report is different, some of the parameter options will vary depending on the report. In the example below ([OUTS-105] Client Demographics report), the required parameters are:

- Choose services
- Housing Status at Entry • Veteran Status
- Starting Date
- Ending Date
- Report Format



Most reports require a starting date and an ending date:

• Starting Date: This date will reflect the date from which you would like to generate data.

• Ending Date: This date will reflect the date you would like to stop generating data.

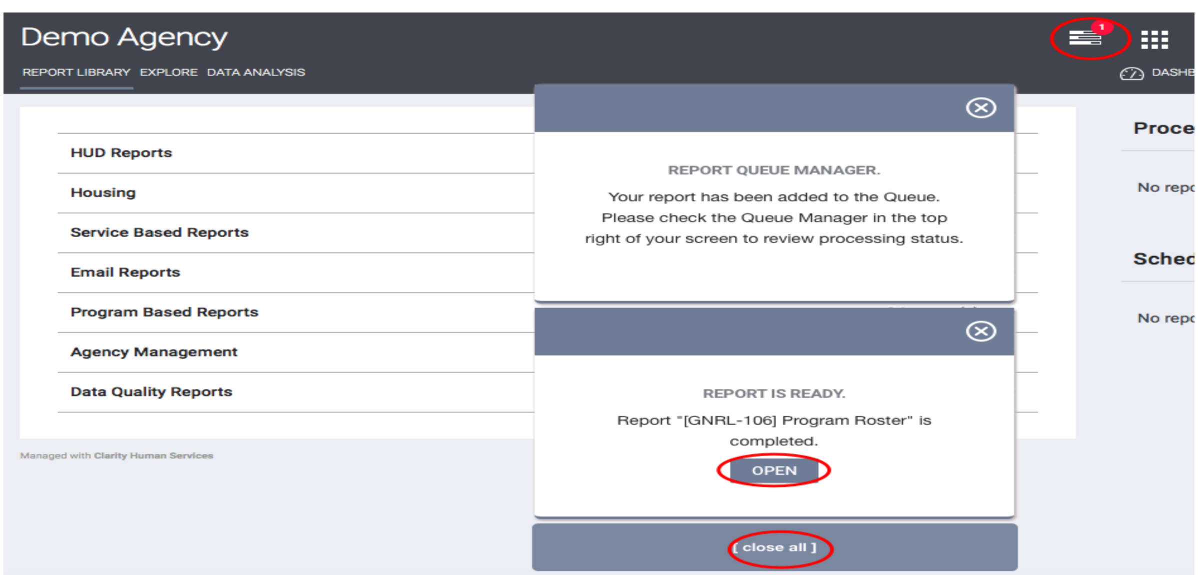
Every report will also ask you to select a report format. You can select Web Page, PDF, or Excel.

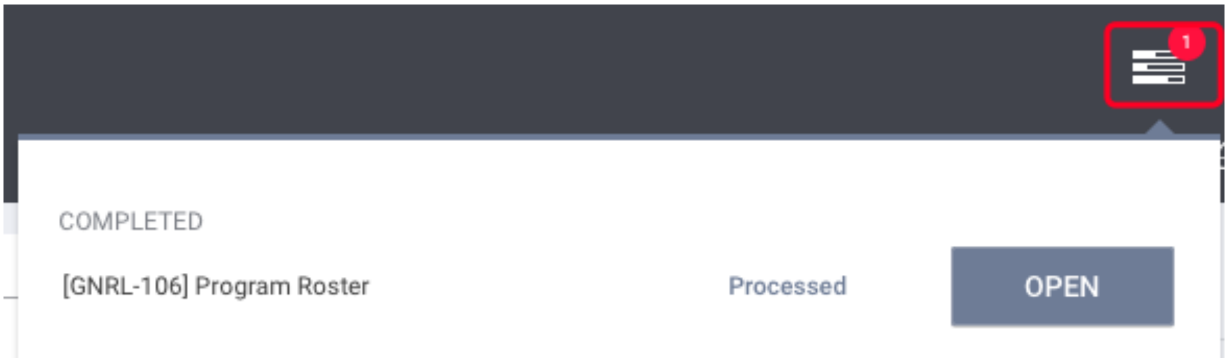
- Web Page: A Web Page is a functional format that allows you to drill down on data elements to inspect the underlying data supporting it.
- PDF: The PDF is a good option for official reports, grants, etc.
- Excel file: If you download the excel file you can use excel to manipulate and organize the data (e.g. Sort/Check for duplicates, etc.)

After choosing your parameters, select the 'OK' button to run the report.

A popup box will appear indicating that your report is being processed. Once the report is processed, a second popup box will appear below the first indicating the report is ready. Select 'Open' to view the report.

Alternatively, you can open the report from the report notification button.

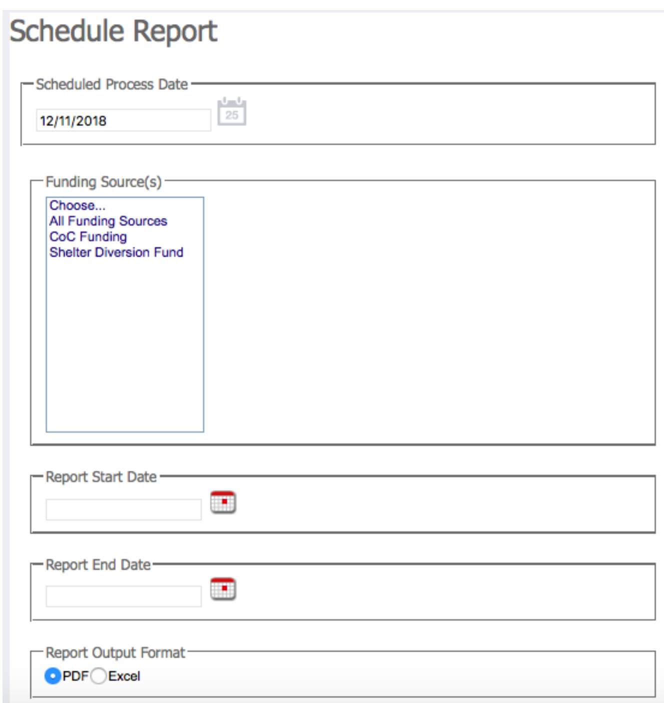




Scheduling a Report

Reports can be run immediately, or they can be scheduled to run at specified times. To schedule a report, select the ‘Schedule’ link instead of the ‘Run’ link.

This will take you to the Preview page where you can select the process date for the report. Use the same directions as above for selecting the parameters.



19. HMIS Support Contact

If you have questions about Clarity HMIS or recommendations to improve the system contact the HMIS of Community Alliance for the Homeless:

HELPDESK@CAFTH.org

Stay involved! Join our HMIS Committee! Contact Helpdesk@cafth.org to find out about our next meeting or look for updates at https://CAFTH.org