



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@cafh.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.

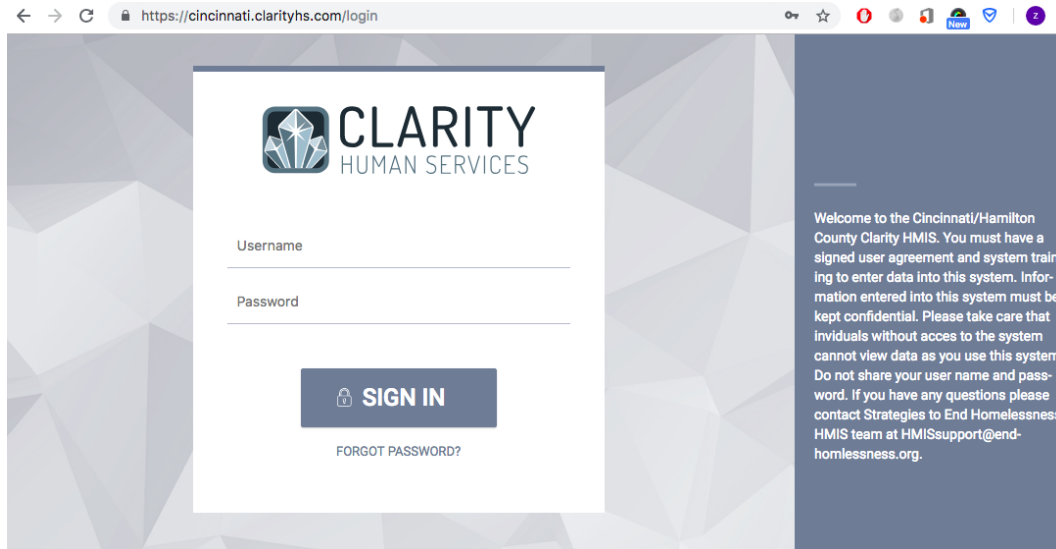
- • None – Client data will not be shared outside of your agency

2. Log in to Clarity

The first step is open the following login page:

<https://memphis.clarityhs.com/login>

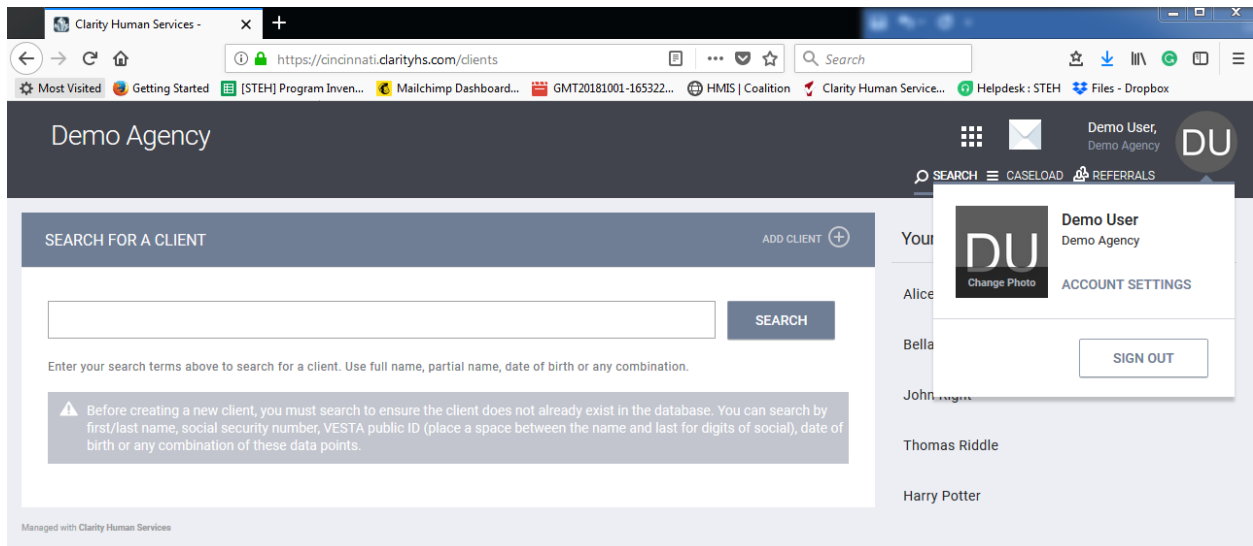
Then enter your username and password, select Sign in. Logging in will take you to the search screen, where you can begin your tasks.



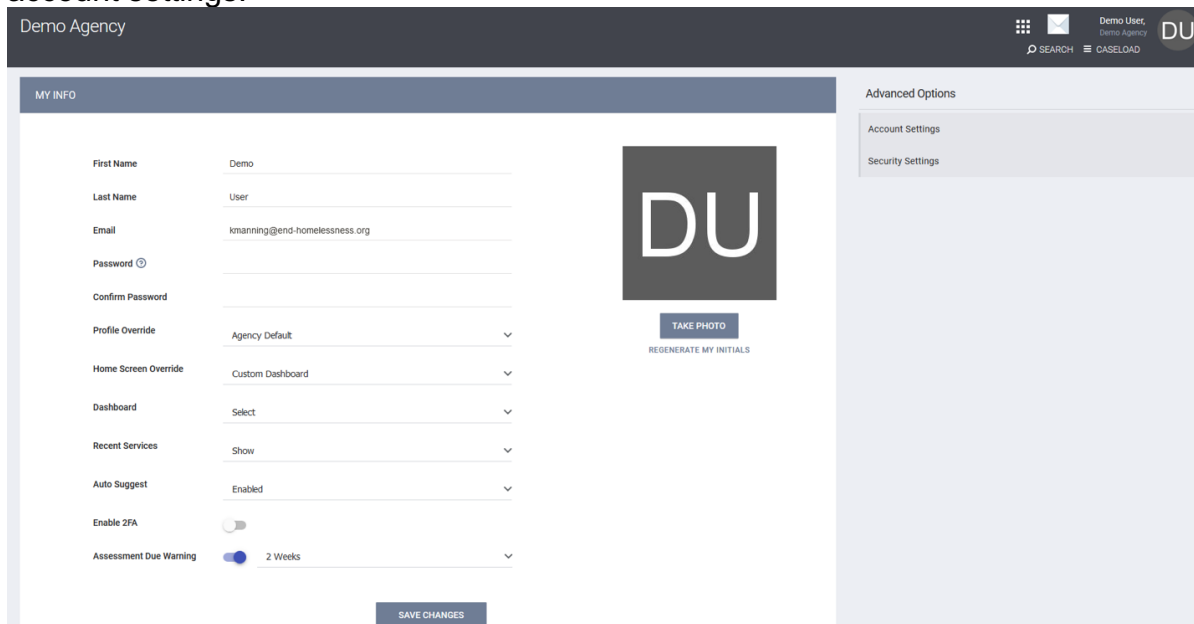
The screenshot shows a web browser window with the address bar displaying <https://cincinnati.clarityhs.com/login>. The login page features a white central box on a grey geometric background. At the top of the box is the Clarity Human Services logo, which includes a stylized diamond icon and the text "CLARITY HUMAN SERVICES". Below the logo are two input fields labeled "Username" and "Password". Underneath these fields is a blue "SIGN IN" button with a lock icon. Below the button is a link that says "FORGOT PASSWORD?". To the right of the login box, on a dark blue background, is a welcome message: "Welcome to the Cincinnati/Hamilton County Clarity HMIS. You must have a signed user agreement and system training to enter data into this system. Information entered into this system must be kept confidential. Please take care that individuals without access to the system cannot view data as you use this system. Do not share your user name and password. If you have any questions please contact Strategies to End Homelessness HMIS team at HMISsupport@end-homelessness.org."



3. User Profile



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





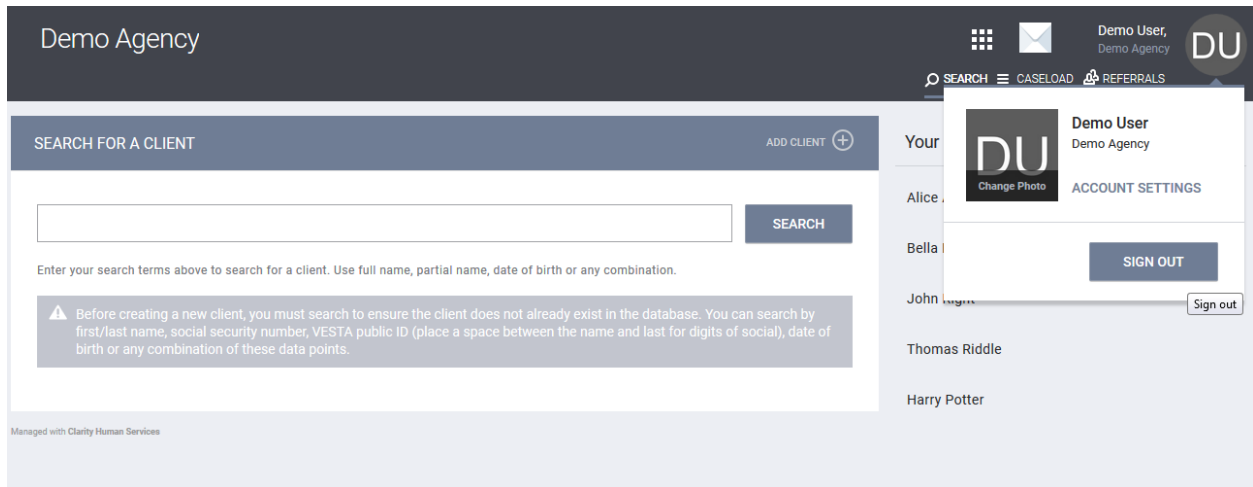
From the Account Settings you can:

- • 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**

SEARCH FOR A CLIENT

ADD CLIENT (+)

a apple

SEARCH

| | | |
|-------------|------------|------|
| Alice Apple | 10/10/1998 | 5555 |
| Andy Apple | 10/10/2017 | 4523 |

Before creating a new client, you must search to ensure that the client does not already exist in the database. You can search by first/last name, social security number, VESTA public ID (place a space between the name and last for digits of social), date of birth or any combination of these data points.



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.

The screenshot displays the CLARITY HUMAN SERVICES interface. The top navigation bar includes "SEARCH FOR A CLIENT" and "ADD CLIENT (+)". The search results table lists two clients: Alice Apple and Andy Apple. The "Edit" icon for Alice Apple is circled in red. The client profile for Alice Apple is shown on the right, including her Social Security Number, Quality of SSN, Last Name, First Name, Quality of Name, Quality of DOB, and Date of Birth. The "ADD CLIENT (+)" button in the top right corner is also circled in red.

| | Date of Birth | Last Four SSN | Last Updated |
|-------------|---------------|---------------|--------------|
| Alice Apple | 10/10/98 | 5555 | 10/30/18 |
| Andy Apple | 10/10/17 | 4523 | 10/30/18 |

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

Before creating a new client, you must search to ensure that the client does not already exist in the database. You can search by first/last name, social security number, VESTA public ID (place a space between the name and last for digits of social), date of birth or any combination of these data points.



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 | <div>None ▼</div> |
| Gender | Select ▼ |



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

The top will show “green” when you successfully save.

Please review your intake to ensure accuracy and completeness.

| | | |
|----------------|-------------------------|---|
| Gender | Male | ▼ |
| Race | White | ▼ |
| Ethnicity | Non-Hispanic/Non-Latino | ▼ |
| Veteran Status | No | ▼ |

ADD RECORD

CANCEL

Your changes have been saved successfully.

CLIENT PROFILE

| | | |
|------------------------|---------------------|--|
| Social Security Number | XXX - XX - 2213 | |
| Quality of SSN | Full SSN Reported ▼ | |
| Last Name | Smith | |
| First Name | Jody | |

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.



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)

A screenshot of a web form titled 'RELEASE OF INFORMATION' in a dark grey header. The form contains four fields: 'Permission' with a dropdown menu showing 'Yes', 'Start Date' with a date field showing '12/06/2018' and a calendar icon, 'End Date' with a date field showing '12/06/2019' and a calendar icon, and 'Documentation' with a dropdown menu. The 'Documentation' dropdown is open, showing options: 'Select' (highlighted with a blue bar and a checkmark), 'Electronic Signature', 'Attached PDF', 'Signed Paper Document', 'Verbal Consent', 'Outside Agency Verified', 'Household', 'Group Member', and 'None'. A red rectangular box highlights the 'Permission', 'Start Date', 'End Date', and 'Documentation' labels on the left side of the form.



- 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.

Jody Smith

PROFILE PROGRAMS ASSESSMENTS

DASHBOARD SEARCH

PRIVACY

Client Privacy

Public Private

SAVE CHANGES CANCEL

RELEASE OF INFORMATION

ADD RELEASE OF INFORMATION

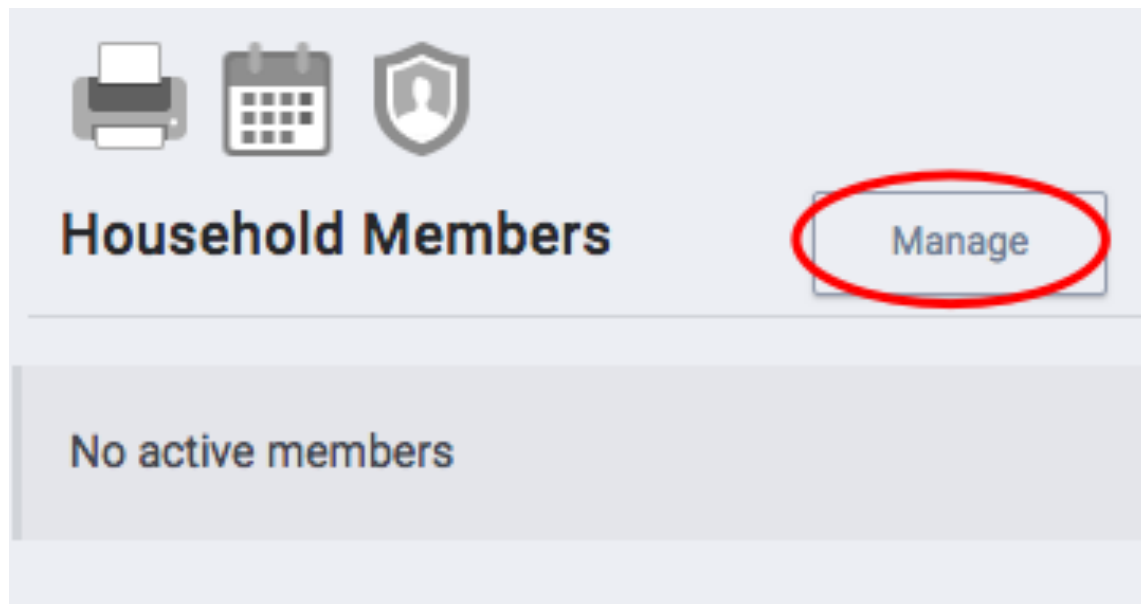
| Permission | Type | Start Date | End Date |
|---------------|------|------------|------------|
| Yes System | None | 12/06/2018 | 12/06/2019 |

Household Memi

No active members

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.

| Your recent client searches accessed: | |
|---------------------------------------|------|
| Alice Apple | 5555 |
| Mary Aster | 6666 |
| Janlah Harvey | 0000 |
| Kerria Anderson | 0000 |
| Beth Wutson | 1111 |
| Test Test | 0000 |



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.

Search for a Household Member

mary as

SEARCH

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

| Client | Date of Birth | Last Four SSN | Last Updated |
|--|---------------|---------------|--------------|
| Mary Aster Existing Group: Head of Household: Mary Aster . Members: 3 | 03/05/98 | 6666 | 11/06/18 |

BACK



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.

ADD TO HOUSEHOLD

Member Type

Son

Start Date

12/06/2018

SAVE

Household Members

| | |
|------------|-----------|
| Jody Smith | Not Set * |
| Test Test | Son |

EDIT GLOBAL HOUSEHOLD

Member Type

Son

Head of Household

Test Test

Joined Household

12/06/2018

Exited Household

☒

12/06/2018

SAVE



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”.

Jody Smith

[PROFILE](#)[HISTORY](#)[PROGRAMS](#)[ASSESSMENTS](#)[NOTES](#)[LOCATION](#)[REFERRALS](#)

[PROFILE](#)[HISTORY](#)[PROGRAMS](#)[ASSESSMENTS](#)[NOTES](#)[LOCATION](#)[REFERRALS](#)[FILES](#)

1


CLIENT

0 %

Families

100 %



Individuals

 **Funding Source**
VA:Supportive Services for Veteran Families
Availability
Full Availability

Service Categories:
☒ VA SSVF Service

Include group members:

☐ Andy Apple

 [PRINT DIRECTIONS](#) [DOC REQUIREMENTS](#)

[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”.

Alice Apple

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

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

Enroll Program for client Alice Apple

Project Start Date

25

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)

▼

LIVING SITUATION

Type of Residence

Select

▼

Length of Stay in Prior Living Situation

Select

▼

Approximate Date Homelessness Started

25

Number of times on the streets, in ES, or SH in the past three years

Select

▼

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.

PROGRAM: DEMO SSVF HOMELESSNESS PREVENTION

EnrollmentHistoryProvide ServicesAssessmentsNotesFilesChart

×

Exit

Services

| | |
|---|-------------------|
| Assistance obtaining VA benefits | VA SSVF Service ▾ |
| Assistance obtaining/coordinating other public benefits | VA SSVF Service ▾ |
| Case management services | VA SSVF Service ▾ |
| Direct provision of other public benefits | VA SSVF Service ▾ |
| Other (non-TFA) supportive service approved by VA | VA SSVF Service ▾ |
| Outreach services | VA SSVF Service ▾ |
| SSVF Financial Services | VA SSVF Service ▾ |

PROGRAM: DEMO SSVF HOMELESSNESS PREVENTION

EnrollmentHistoryProvide ServicesAssessmentsNotesFilesChart

×

Exit

Services

| | |
|---|-------------------|
| Assistance obtaining VA benefits | VA SSVF Service ▲ |
| Educational assistance ▾ | |
| Employment and training services ▾ | |
| Health care services ▾ | |
| VA vocational and rehabilitation counseling ▾ | |



Case management services

VA SSVF Service ^

Case management services

Start Date: 12/06/2018

End Date: 12/06/2018

Service Note

B

I

1

2

•

•

•

SUBMIT

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.

24



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 | X 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.

The screenshot shows a software interface for adding a program assessment. On the left, a sidebar contains program details: a green header with "52 DAYS ACTIVE PROGRAM", a table with fields like "Program Type: Individual", "Program Start Date: 10/15/2018", "Assigned Staff: Demo User", and "Head of Household: Alice Apple", and sections for "Program Group Members" (showing "No active members") and "Status Assessments" (listing three entries for 10/30/2018 with "ANNUAL", "STATUS", and "STATUS" buttons). The main area is titled "ADD PROGRAM ASSESSMENT" with a close button. It features a toggle switch for "Alice Apple" (currently turned on) and a "Not Set" option. At the bottom are two buttons: "ADD STATUS ASSESSMENT" and "ADD ANNUAL ASSESSMENT".

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.

PROGRAM HISTORY

| | Program Name | Start Date | End Date | Type |
|---|---------------------------------------|------------|---------------|------------|
|  | Demo Shelter Diversion Demo Agency | 11/28/2018 | Active | Individual |
| | Demo Emergency Shelter Demo Agency | 11/08/2018 | Active | Individual |

PROGRAM: DEMO SHELTER DIVERSION

Enrollment **History** Provide Services Assessments Notes Files Chart

 Exit

Program Service History

LINK FROM HISTORY

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.

The screenshot shows the "PROGRAMS" tab selected in the top navigation bar. The main header for the program is "PROGRAM: DEMO SHELTER DIVERSION". Below this is a sub-header with tabs: "Enrollment", "History", "Provide Services", "Assessments", "Notes", "Files", and "Chart". The "Provide Services" tab is currently active. On the left side, there is a green box indicating "8 DAYS ACTIVE PROGRAM". Below this, a table lists program details: "Program Type: Individual", "Program Start Date: 11/28/2018", "Assigned Staff: Demo User" (with a checkmark), and "Head of Household: Alice Apple" (with a checkmark). Further down, there are sections for "Program Group Members" (showing "No active members") and "Status Assessments" (showing "No statuses"). At the bottom, it states "Assessment due every year" and "Notification: ON" (with a checkmark).



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.

Alice Apple

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

DASHBOARD SEARCH

HISTORY

Advanced Search Options View

| Service Name | Start Date | End Date | |
|---|------------|-------------------------|--|
| Case management services:Case management services Demo Agency | 12/06/2018 | 12/06/2018 | |
| Demo Shelter Diversion Demo Agency | 11/28/2018 | Active | |
| Referral: Demo SSVF Rapid Re-Housing Demo Agency referral to Demo Agency | 11/21/2018 | Pending (in process) | |
| Referral: Demo SSVF Rapid Re-Housing Demo Agency referral to Demo Agency | 11/21/2018 | Pending | |
| VI-SPDAT Prescreen for Single Adults [V1] Demo Agency | | 11/21/2018 | |
| Demo Emergency Shelter Demo Agency | 11/08/2018 | Active | |
| Case management services:Case management services Demo Agency | 10/31/2018 | 10/31/2018 | |
| Assistance obtaining VA benefits:Educational assistance Demo Agency | 10/30/2018 | 10/30/2018 | |

Household Member

Andy Apple

Active Programs

Demo Shelter Diversion

Demo Emergency Shelter

Demo Permanent Support

Demo SSVF Homelessness

Demo PATH Street Outreach

Recent Services

SSVF Financial Services:Child Care
Demo Agency

10/30/2018 10/30/2018

Case management services:Case management services
Demo Agency

10/26/2018 10/26/2018

Demo Permanent Supportive Housing
Demo Agency

10/25/2018 Active

Expense Date: 10/30/2018
Expense Amount: \$200.00

Assigned Staff 1



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:

HISTORY

Advanced Search Options Hide ^

Search

Category Any category Agency Any agency Start Date End Date Type Any type Clear SEARCH

- 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

HISTORY: EDIT

Service Name

SSVF Financial Services

Service Item

Child Care

Category

VA SSVF Service

Delivery Type

Long Term

Agency

Demo Agency (Entered by: Demo User)

Expiry Warning

☐

Start Date

10/30/2018

End Date

10/30/2018

Authorization lock

☐

Service details including Start and End Date

EXPENSES (\$200.00)

ADD EXPENSE

| Funding Source | Agency Name | Expense Date | Amount |
|----------------|-------------|--------------|----------|
| No Funding | Demo Agency | 10/30/2018 | \$200.00 |

NOTES

B

I

Option to add notes to this service

31



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”.


This screenshot shows the top portion of the Clarity Human Services application. A dark navigation bar at the top contains several tabs: PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES (which is highlighted with a red box), LOCATION, REFERRALS, and FILES. Below this is a light blue header bar labeled "CLIENT NOTES" on the left and an "ADD NOTE (+)" button on the right, also highlighted with a red box. The main area below the header is white and contains the text "There are no results to display".

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

This screenshot shows the "Add Note" form within the application. The form is set against a light blue background. It includes several input fields: "Title" with the value "intake", "Agency" with "Demo Agency", and "Date" with "12/10/2018". To the right of the date is a calendar icon showing the number 25. Below these is a "Time Tracking:" label followed by two "Select" dropdown menus. The "Note" field is a large text area with a rich text editor toolbar at the top (containing Bold, Italic, Bulleted List, and Numbered List icons) and the text "intake" entered. At the bottom of the form are two buttons: "ADD RECORD" (highlighted with a red box) and "CANCEL".



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

| CLIENT NOTES | | | ADD NOTE (+) |
|---|------------|------------|--------------|
| Title | Staff | Date | |
|  intake Demo Agency | Zach Zheng | 12/10/2018 | |

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.

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

CLIENT FILES

ADD FILE (+)

There are no results to display



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

UPLOAD A FILE

| | | |
|----------|---|---|
| Category | Family, Social and Legal | ▼ |
| Name | Alimony Agreement | ▼ |
| File | <div>Select File</div> <div>Trouble attaching files? Switch to the Basic Uploader</div> | |

ADD RECORD

CANCEL

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.)



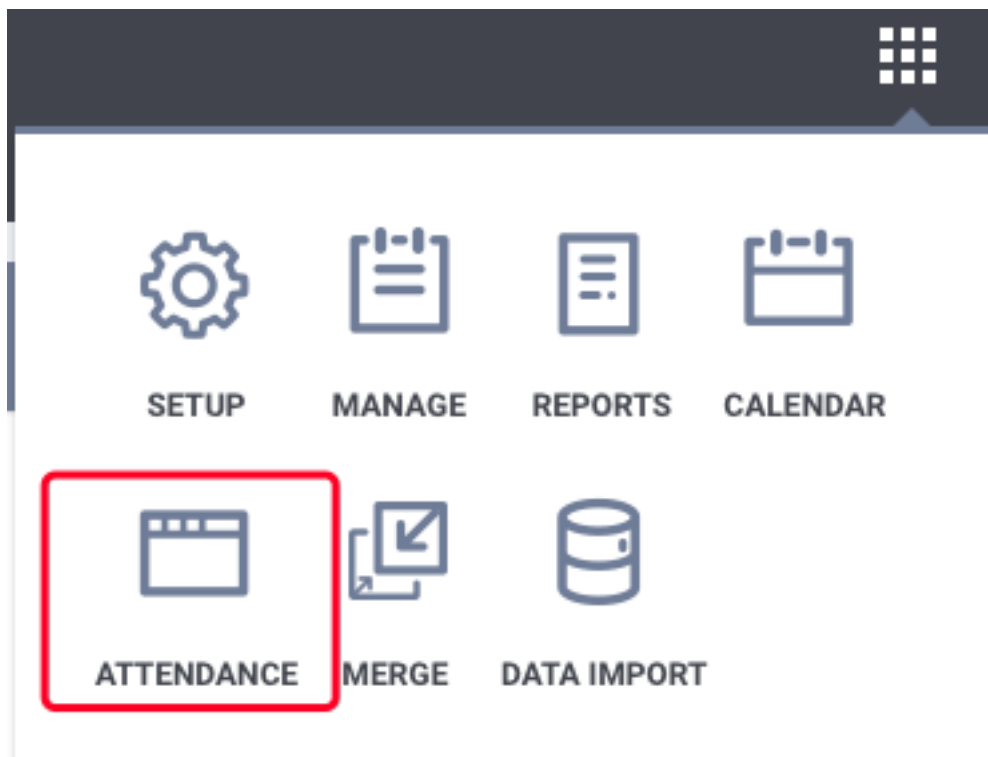
17. Daily Attendance Service Transactions

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 

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.

CASE MANAGEMENT: CASE MANAGEMENT

Date 12/10/2018 

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 |



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.

Client Search

SEARCH

| Clients Name | Date of Birth | Last SSN | |
|----------------|---------------|----------|---|
| ▼ Apple, Alice | 10/10/1998 | 5555 |  Add |
| ▼ Apple, Andy | 10/10/2017 | 4523 |  Add |

Client Search


SEARCH

| Clients Name | Date of Birth | Last SSN | |
|----------------|---------------|----------|--|
| ▼ Apple, Alice | 10/10/1998 | 5555 | |
| ▼ Apple, Andy | 10/10/2017 | 4523 | |



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

CASE MANAGEMENT: CASE MANAGEMENT

Date 12/10/2018 

Monday, December 10th, 2018

Manual

Scanned

In Attendance

| Client Name | Last 4 SSN | |
|-------------|------------|---|
| Right, Joe | 3123 |  |

18. Reporting

Accessing the Report Library

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



SETUP



MANAGE



REPORTS



CALENDAR



ATTENDANCE



MERGE



DATA IMPORT



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."

| REPORT LIBRARY EXPLORE DATA ANALYSIS | | |
|---|-----------------------|--|
| | | |
| HUD Reports | 7 report(s) | ▼ |
| Housing | 3 report(s) | ▼ |
| Service Based Reports | 14 report(s) | ▼ |
| Email Reports | 5 report(s) | ▼ |
| Program Based Reports | 24 report(s) | ▼ |
| Agency Management | 3 report(s) | ▼ |
| Data Quality Reports | 1 report(s) | ▼ |
| Service Based Reports | 14 report(s) | ▲ |
| [GNRL-102] Client List | ▶ RUN | 📅 SCHEDULE MORE INFO ▼ |
| [OUTS-105] Client Demographics | ▶ RUN | 📅 SCHEDULE MORE INFO ▼ |
| [EXPS-101] Funding Source Financial Detail | ▶ RUN | 📅 SCHEDULE MORE INFO ▼ |
| [GNRL-104] Service Summary | ▶ RUN | 📅 SCHEDULE MORE INFO ▼ |
| [JRSD-103] Zip Code Jurisdictional Breakout | ▶ RUN | 📅 SCHEDULE MORE INFO ▼ |
| [GNRL-103] Service Census | ▶ RUN | 📅 SCHEDULE MORE INFO ▼ |
| [OUTS-105-F] Client Demographics (Flat version) | ▶ RUN | 📅 SCHEDULE MORE INFO ▼ |



To review more information, click “More Information”

Service Based Reports

14 report(s) ^

[GNRL-102] Client List

[▶ RUN](#) | [📅 SCHEDULE](#) | [MORE INFO ▼](#)

[OUTS-105] Client Demographics

[▶ RUN](#) | [📅 SCHEDULE](#) | [LESS INFO ^](#)

This report provides client demographic details for selected services for a specified time period. For the report that is designed to collect demographic for programs, use [OUTS-106] Client Demographics. For a version of a service-based demographic report that does not include charts, graphs, and figures use [OUTS-105] Client Demographics (Flat Version) The information for this report comes from the client profile screen.

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

REPORT LIBRARY EXPLORE DATA ANALYSIS PREVIEW

Service(s)
Choose...
All
Adult day care and personal assistance: Adult day care and personal assistance
Assistance obtaining VA benefits: Educational assistance
Assistance obtaining VA benefits: Educational assistance
Assistance obtaining VA benefits: Employment and training services
Assistance obtaining VA benefits: Employment and training services
Assistance obtaining VA benefits: Health care services
Assistance obtaining VA benefits: Health care services
Assistance obtaining VA benefits: VA vocational and rehabilitation counseling
Assistance obtaining VA benefits: VA vocational and rehabilitation counseling
Assistance obtaining/ coordinating other public benefits: Child care
Assistance obtaining/ coordinating other public benefits: Child care
Assistance obtaining/ coordinating other public benefits: Daily living services
Assistance obtaining/ coordinating other public benefits: Daily living services

Veteran Status
Choose...

Starting Date

Ending Date

Report Format
☒ Web Page ☐ PDF ☐ Excel



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.

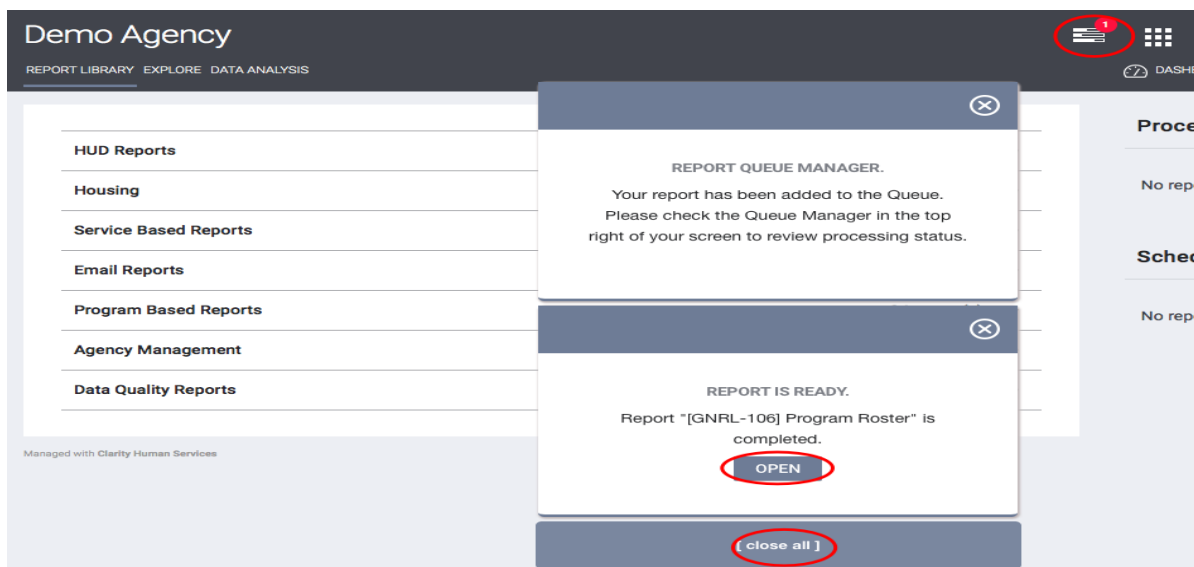
Every report will also ask you to select a report format. You can select Web Page, PDF, or Excel.

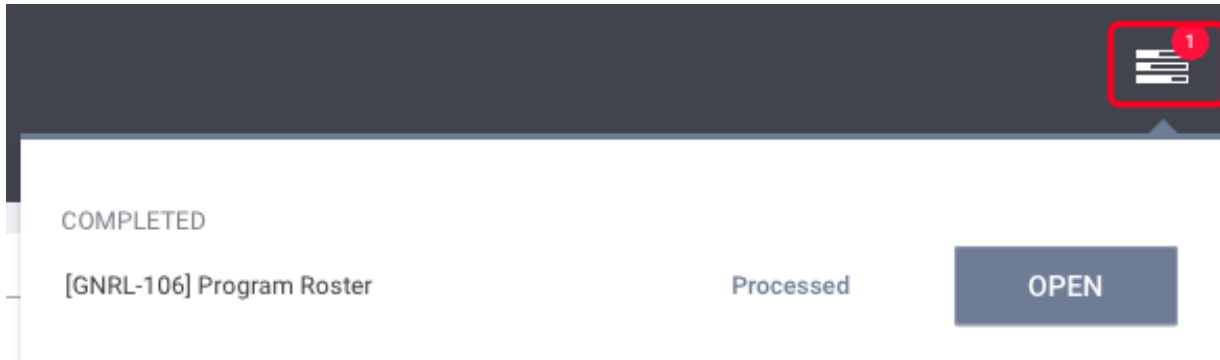
- **Web Page:** A Web Page is a functional format that allows you to drill down on data elements to inspect the underlying data supporting it.
- **PDF:** The PDF is a good option for official reports, grants, etc.
- **Excel file:** If you download the excel file you can use excel to manipulate and organize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


Schedule Report


Scheduled Process Date

12/11/2018 

Funding Source(s)

Choose...
All Funding Sources
CoC Funding
Shelter Diversion Fund

Report Start Date 

Report End Date 

Report Output Format

☒ PDF ☐ Excel

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>