HOMELESS MANAGEMENT INFORMATION SYSTEM (HMIS)
TRAINING MANUAL

Sacramento County Continuum of Care
&
Yolo County Continuum of Care

Revised 03.01.17

Need Help/Have Questions?

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Other Useful Resources

Clarity Human Services Help Portal
http://help.clarityhs.com/

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

HUD- HMIS News & Announcements
https://www.hudexchange.info/hmis

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Introduction to HMIS

To end homelessness, a community must know the scope of the problem, the characteristics of those who find themselves homeless, and understand what is working in their community and what is not. Solid data enables a community to work confidently towards their goals as they measure outputs, outcomes, and impacts.

A Homeless Management Information System (HMIS) is the information system designated by a local Continuum of Care (CoC) to comply with the requirements of CoC Program interim rule 24 CFR 578. It is a locally-administered data system used to record and analyze client, service and housing data for individuals and families who are homeless or at risk of homelessness. HMIS is a valuable resource because of its capacity to integrate and unduplicate data across projects in a community. Aggregate HMIS data can be used to understand the size, characteristics, and needs of the homeless population at multiple levels: project, system, local, state, and national. The Annual Homeless Assessment Report (AHAR) is HUD's annual report that provides Congress with detailed data on individuals and households experiencing homelessness across the country each year. This report could not be written if communities were not able to provide HUD with reliable, aggregate data on the clients they serve.

In 2010 the U.S. Interagency Council on Homelessness (USICH) affirmed HMIS as the official method of measuring outcomes in its *Opening Doors: Federal Strategic Plan to Prevent and End Homelessness.* Since then many of the federal agencies that provide McKinney-Vento Act and other sources of funding for services to specific homeless populations have joined together and are working with HUD to coordinate the effort.

What HMIS Software do we Use?

In Sacramento and Yolo County the software we are using for HMIS is called Clarity Human Services. Clarity Human Services is a powerful information management system that provides client tracking and case management, service and referral management, and reporting. This secure system allows a number of different agencies and users to continuously enter their clients' data while being assured that the information is protected. Sacramento and Yolo County's HMIS is overseen by a Working Group that includes representatives from various organizations, advocacy organizations, and providers serving specific populations such as youth and veterans.

Sacramento Steps Forward (SSF) with support from Bitfocus, Inc. administers all aspects of the HMIS project for Sacramento County.

Who is Bitfocus?

Bitfocus is an IT consultancy, providing custom software development, database management, report development, Technical Assistance (TA) and many other tasks not just exclusive to HMIS.

Clarity Human Services Software

The Clarity Human Services Software is a new database management system developed by Silver Spur Systems LLC, a separate firm from Bitfocus that was established when METSYS was purchased. Both Bitfocus and Silver Spur are owned by Robert Herdzik. Clarity operates as a Cloud Service: a software application that is provided as a live service through a web browser such as Internet Explorer, Firefox, Safari or Chrome, rather than a product you need to download and install. This means wherever you or your authorized users are, only the internet and your secure login details are required to access the Clarity database management system.

Who Benefits?

A. **Benefits for men, women, and children who experience homelessness include:**
- A decrease in duplicative intakes and assessments
- Streamlined referrals
- Coordinated case management

B. **Benefits for agency directors and program managers include:**
- Tracking client outcomes
- Coordinating services, internally among agency programs, and externally with other providers
- Preparing financial and programmatic reports for funders, boards, and other stakeholders
- Information for program design decisions

C. **Benefits for public policy makers and advocates include:**
- Understanding the extent and scope of homelessness
- Unduplicated count
- Identifying service gaps
- Informing systems design and policy decisions
- Development of a forum for addressing community-wide issues

How SSF connects with providers who are using the system?

HMIS User Meeting: SSF conducts a monthly HMIS User Meeting (4th Wednesday of each month) to aid in community building and HMIS networking across the CoC. This meeting serves as place for communication about HMIS/Clarity System and guides in communication so that SSF can better address the needs of the service providers and front-line staff. Also, SSF's HMIS team provides ongoing training and support for the HMIS users via e-mail and phone. **Remember you *drive the system!***

Agencies Required To Participate In HMIS

The HMIS Federal Partners worked collaboratively to develop the HMIS Data Standards. HUD has worked with program staff of these partners to align the data elements required for each program funding source and determine how and when data is to be collected. The federal partners and programs include:

- U.S. Department of Housing and Urban Development (HUD)
  - Office of Special Needs Assistance Programs (SNAPS)
    - Continuum of Care (CoC) Program
    - Emergency Solutions Grants (ESG)Program
    - Housing Opportunities for Persons with AIDS program (HOPWA)
    - HUD-Veterans Affairs Supportive Housing (HUD/VASH)
    - Rural Housing Stability Assistance Program (RHSP)

- U.S. Department of Health and Human Services (HHS)
  - Administration for Children and Families (ACYF) – Family and Youth Service Bureau (FYSB)
    - Runaway and Homeless Youth (RHY)
  - Substance Abuse and Mental Health Services Administration (SAMHSA)
    - Projects for Assistance in Transition from Homelessness (PATH)

- U.S. Department of Veteran Affairs (VA)
    - Supportive Services for Veteran Families Program (SSVF)
    - Community Contract Emergency Housing (HCHV/EH)*
    - Community Contract Residential Treatment Program (HCHV/RT)*
    - Domiciliary Care (HCHV/DOM)*
    - VA Community Contract Safe Haven Program (HCHV/SH)*
    - Grant and Per Diem Program (GPD)*
    - Compensated Work Therapy Transitional Residence (CWT/TR)*

*Participation in HMIS is not required as part of a funding requirement except for SSVF. The federal partners recognize that communities record Project Descriptor Data Elements and Universal Data Elements in order to facilitate completion of the HIC and PIT.

In order to gain as comprehensive a picture of homelessness as possible, many other agencies are strongly encouraged to use HMIS but are not required to do so. These include agencies that provide housing services (e.g. transitional housing, supportive housing, emergency shelters), as well as auxiliary services (e.g. food shelves and outreach programs). The system has the potential of being a powerful tool to track what is happening with individuals who are experiencing homelessness, as well as tracking people who are in danger of losing their housing. So all agencies that provide services related in one way or another to persons experiencing homelessness are encouraged to use HMIS.

What data is collected?

Universal Data Elements

HMIS Universal Data Elements are elements required to be collected by all projects participating in HMIS, regardless of funding source. The Universal Data Elements establish the baseline data collection requirements for all contributing projects. They are the basis for producing unduplicated estimates of the number of people experiencing homelessness, accessing services from homeless assistance projects, basic demographic characteristics of people experiencing homeless, and patterns of service use, including information on shelter stays and homelessness over time.

The following are the Universal Data Elements:

3.1	Name	3.10	Project Entry Date
3.2	Social Security Number	3.11	Project Exit Date
3.3	Date of Birth	3.12	Destination
3.4	Race	3.13	Personal ID
3.5	Ethnicity	3.14	Household ID
3.6	Gender	3.15	Relationship to Head of Household
3.7	Veteran Status	3.16	Client Location
3.8	Disabling Condition	3.17	Length of Time on Street, in an ES or Safe Haven
3.9	Residence Prior to Project Entry		

Program Specific Data Elements

Program Specific Data Elements differ from the Universal Data Elements in that no one project must collect every single element in this section. Which data elements are required is dictated by the reporting requirements set forth by each Federal partner for each of their programs. A Partner may require all of the fields or response categories in a data element or may specify which of the fields or response categories are required for their report.

The following Program Specific Data Elements are required by more than one Federal Partner:

4.1	Housing Status	4.11	Domestic Violence
4.2	Income and Sources	4.12	Contact
4.3	Non-Cash Benefits	4.13	Date of Engagement
4.4	Health Insurance	4.14	Services Provided
4.5	Physical Disability	4.15	Financial Assistance Provided
4.6	Developmental Disability	4.16	Referrals Provided
4.7	Chronic Health Condition	4.17	Residential Move-In Date
4.8	HIV/AIDS	4.18	Housing Assessment Disposition
4.9	Mental Health Problem	4.19	Housing Assessment at Exit
4.10	Substance Abuse		

For more details on these elements, please refer to the 2014 HMIS Data Standards (link in back).

Potential Risks

Potential risks of HMIS, like any system for managing data about individuals, include risks to personal privacy. Data privacy and security has been emphasized at every step in developing and implementing Sacramento and Yolo County's HMIS, from choosing software, to designing client notices, and crafting policies and procedures. Clarity's data security model is extremely effective, and only allows people to see client information that they have permission to see. Additionally, before being able to use the system, agencies and end-users within agencies must sign User's agreements indicating that they will uphold rigorous data privacy standards. No information that would enable the federal government to identify particular individuals is sent to HUD via Sacramento and Yolo County's HMIS.

End-User Agreement

Sacramento Steps Forward recognizes the privacy of consumers in the design and management of the Homeless Management Information System (hereafter referred to as HMIS). This design combines the expectation to vigilantly maintain client confidentiality, treating the personal data of our most vulnerable populations with respect and care, with the need to continually improve the quality of homeless and housing services to ultimately eliminate homelessness in our community. HMIS participating agencies, as well as each authorized user within any HMIS participating agency, are bound by various restrictions regarding Protected Personal Information ("PPI"). The employee, contractor, or volunteer whose name appears above is the **User**.

Your user ID and password give you access to both the Sacramento and Yolo County HMIS. Initial each item below to indicate your understanding and acceptance of the proper use of your user ID and password. Failure to uphold the confidentiality standards set forth below is grounds for immediate termination of your access to the HMIS.

As the guardians entrusted with this personal data, HMIS Users have a moral and legal obligation to ensure that the data they gather is being collected, accessed and used appropriately. It is also the responsibility of each User to ensure that client data is only used to the ends to which it was collected, ends that have been made explicit to clients and are consistent with the mission to assist families and individuals in our community to resolve their housing crisis. Proper User training, adherence to the HMIS Policies and Procedures Manual, and a clear understanding of client confidentiality are vital to achieving these goals.

By executing this agreement you agree to abide by the following client confidentiality provisions:

1. I understand that I have an obligation to maintain client privacy and to protect and safeguard the confidentiality of a client's PPI. PPI includes, but is not limited to, client's name, address, telephone number, social security number, date of birth, type of care provided, medical condition or diagnosis, veteran status, employment information, and any and all other information relating to the services provided to the client by this or other agencies.

2. I understand that my User ID and Password give me access to the HMIS.

3. My User ID and Password are for my use only. I will not share or allow them to be shared with any person for any reason. I will never select the option to have my browser save my HMIS password.

4. I will take all reasonable means to keep my User ID and Password physically secure to prevent its use by any other person.

5. I understand that the only individuals who can view information in the HMIS are authorized users and the clients to whom the information pertains.

6. I understand that not all Users can view all information.

7. I will only view, obtain, disclose, or use the database information that is necessary to perform my job.

8. SACRAMENTO USERS: Sacramento Continuum of Care now has shared HMIS system and as a Sacramento HMIS user you may be able to see client's program and service history depending on your access level. As a HMIS User, I understand that I may not look up a client in the HMIS to know their whereabouts for purposes of outside inquiries or personal use. All outside inquiries must be forwarded to Sacramento Steps Forward.

9. I agree to use the HMIS ONLY for business purposes related to serving the clients of my agency.

10. I understand that my computer/mobile Devices must have Password protected screensavers set at no more than 15 minute intervals

11. A computer that has HMIS open and running shall never be left unattended by the person with the authorization to use that computer.

12. If I am logged into the HMIS and must leave my work area for any length of time, I must log-off the HMIS and close the Internet browser before leaving the work area.

13. Failure to log off the HMIS appropriately may result in a breach in client confidentiality and system security.

14. I agree to enter data into the HMIS in accordance to the Partner Agency Agreement, the policies of my agency, and the HUD HMIS Data Standards.

15. The appropriate **Client's Consent form** must be signed by each client whose data is to be entered into the HMIS.

16. I will obtain and file a hard copy of such client consent forms as are required by my agency, state and/or federal law and the HMIS. It is recommended that the signed copy also be uploaded to the consumer record in HMIS.

17. I agree to that I will maintain HMIS data in such a way as to protect against revealing the identity of clients to unauthorized agencies, individuals or entities.

18. Based on the client's response on their Consent Form, I may not share client data with individuals or agencies that have not entered in as a HMIS Participating Agency without obtaining written permission from that client.

19. I will not discuss client's personal information with anyone in a public area.

20. Hard copies of HMIS data must be kept in a secure file. I will not leave hard copies in public view, on my desk, or on a photocopier, printer or fax machine. I agree to properly protect and store in a secure location the client specific hardcopy information printed from the Sacramento HMIS or the intake/Assessment/Exit forms. When hard copies of HMIS data are no longer needed, they must be properly destroyed (i.e. shredded) to maintain confidentiality.

21. If I must save client information from HMIS in a digital format, I agree to save such files and information only in a secure folder or drive that is only accessible to me. Such files will be destroyed when no longer needed.

22. I will not electronically transmit unencrypted client data across a public network. I understand that Personal identifiable (Name, SSN, DOB) client data cannot be distributed through email.

23. If I notice or suspect a security breach, I shall immediately notify the designated HMIS Contact person in my agency or the HMIS Analyst employed by Sacramento Steps Forward.

24. As an HMIS user, I will treat clients and potential clients of my agency and other agencies with respect, fairness, and good faith in obtaining and entering their data.

25. Discriminatory comments based on race, color, religion, national origin, ancestry, handicap, age, sex and sexual orientation are not permitted in the HMIS. Profanity and offensive language are not permitted in the HMIS.

26. All technology equipment (including flash drives, computers, printers, copiers and fax machines) that has been used to access HMIS, and which will no longer be used to access HMIS, must have their hard drives reformatted multiple times.

27. All technology equipment (including flash drives, computers, printers, copiers and fax machines) that has been used to access HMIS, and is now non-functional, must have their hard drives pulled, destroyed and disposed of in a secure fashion.

HMIS User Code of Ethics

A. HMIS users must treat all HMIS participating agencies with respect, fairness and good faith.

B. Each HMIS user should maintain high standards of professional conduct in their capacity as an HMIS user.

C. HMIS users have the responsibility to relate to the clients of all HMIS participating agencies with full professional consideration.

I have read, understand, and agree to comply with all of the above listed statements. I understand that failure to comply with this user agreement may result in having my access to the HMIS system terminated. There is no expiration date of this agreement. By signing below, you are indicating that you understand and agree to comply with all requirements set forth in this Agreement.

HMIS Computer Requirements/ Workstation Security

Do not share your Account
Data security goes beyond your computer. You need to ensure that the PPI that is gathered and input into the HMIS needs to be secure at all times.

- Each HMIS user is also required to submit a signed receipt of HMIs User Agreement prior to system access.
- Passwords are only know by the individuals, which are not even know by the HMIS administrator of Agency or Lead Agency

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.

Working from Home
- Agency's Privacy policy should cover **"work from home"** policy if staff is allowed to work at home. The security setting should match professional work environment.
- Download of client data on home computers.
  - If completing work at home/approved remote locations, plan for the process, control/restrict downloads, and insure hard drives are properly cleaned.

Application Security
The following standards must be observed when working with the HMIS system in Clarity.

- Written information specifically pertaining to user access (e.g., username and password) may not be stored or displayed in any publicly accessible location.
- You may not log on to more than one workstation at a time.
- You may not log on to the network at more than one location at a time.

Workstation Security

Access to the HMIS system in Clarity must be secured at all times.

- Computers in public areas used to collect and store HMIS data must be staffed at all times.
- When workstations are not in use and staff is not present, steps should be taken to ensure that the computers and data are secure and not usable by unauthorized individuals.
- After a short amount of time, workstations should automatically turn on a password protected screensaver when the workstation is temporarily not in use.
- If staff will be gone for an extended period of time, staff should log off the data entry system and computer.
- Written information pertaining to user access should not be stored or displayed in any publicly accessible location.

Workstation Security Standards

Lock Workstation
- **Anytime** you leave your workstation unattended, for any amount of time, **LOCK YOUR WORKSTATION**.

Password-protected Screensaver
- **Password protected screensavers** should be set to **activate** within **5 to 8 minutes** when the workstation is not in use.

Log Off for Extended Periods
- If you will be gone from your workstation for 30 minutes or more, **log-off Clarity**.
- If you will be gone from your workstation for 4 hours or more, **log-off your computer**.

Disposing of Confidential Client Information

Printing and Disposing of Hard Copy Data

- Hard copy data containing Personal Projected Information (PPI) may only be printed from the HMIS system at the physical agency/jurisdiction location(s) and only on printers secured from public access.

- An agency/jurisdiction is responsible for disposing of documents that contain PPI by shredding paper records.

HMIS Technology Equipment Re-Use and Disposal

All technology equipment with hard drives that are used in conjunction with HMIS will be handled according to the following guidelines:

- **Re-assigned Equipment**
  All technology equipment (including computers, printers, copiers and fax machines) used to access HMIS and which will no longer be used to access HMIS will have **their hard drives reformatted multiple times.**

- **Non-functional Equipment**
  All technology equipment (including computers, printers, copiers and fax machines) used to access HMIS and is now non-functional, must have their **hard drives pulled, destroyed and disposed of in a secure fashion.**

- **Leased Equipment**
  When leasing technology equipment, the lease agreement shall include provisions for either the leasing company or the agency to (1) reformat the hard drive multiple times, or (2) destroy the hard drive.

Client Consent & Notification

Important steps to follow when collecting data from clients

- 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.

Consumer Notice

- "HMIS **Consumer's Notice**" must be posted and clearly visible to clients at every location that HMIS Intake is being conducted.
  - o All outreach workers and case managers who are conducting HMIS intake off-site must carry the "Consumer's Notice" with them and clearly post at the station where intake is being conducted.

Written Informed Consent

At entry into the program, the Agency will provide a verbal explanation of both the HMIS and the terms of consent. The client will complete, sign and date the HMIS "Consumers Informed Consent & Release of Information Authorization." The agency will not divulge confidential information without informed client consent. Clients cannot be denied services that they would <u>otherwise qualify for </u>based on a refusal to share information.

1. **NEVER** add a new client to Clarity until you have reviewed the "Consumer Consent Form"

2. **DO NOT** start entering client data until you have reviewed the intake forms to ensure that all questions have been answered.

3. **RETURN** incomplete intakes to the case manager or data collector for completion before entering them in the system.

Consumers Informed Consent & Release of Information Authorization

I, (print consumer's name)_____, understand that (Service Provider) _____collected information about me and/or my dependents listed below to enter it into a database system called Homeless Management Information System (HMIS). This database helps us to better understand homelessness, to improve service delivery to the homeless, and to evaluate the effectiveness of services provided to the homeless. Participation in data collection and release, although optional, is a critical component of our community's ability to provide the most effective services and housing possible. The information that is collected in the HMIS database is protected by limiting access to the database and by limiting with whom the information may be shared, in compliance with the standards set forth by federal, state, and local regulations governing confidentiality of client records. Every person and agency that is authorized to read or enter information into the database has signed an agreement to maintain the security and confidentiality of the information.

BY SIGNING THIS FORM, I AUTHORIZE THE FOLLOWING:
The information gathered and prepared by this agency will be included in a HMIS database of participating agencies (list available), and only to participating agencies, who have entered into an HMIS Agency Participation Agreement and shall be used to:
- a. Produce a client profile at intake that will be shared by collaborating agencies
- b. Produce anonymous, aggregate-level reports regarding use of services
- c. Track individual program-level outcomes
- d. Identify unfilled service needs and plan for the provision of new services
- e. Allocate resources among agencies engaged in the provision of services

BY SIGNING THIS FORM, I AUTHORIZE THE FOLLOWING:
I authorize the participating agencies and their representatives to share basic information regarding my family members listed below and/or me. I understand that this information is for the purpose of assessing my/our needs for housing, utility assistance, food, counseling and/or other services.

THE INFORMATION MAY CONSIST OF THE FOLLOWING PPI (PROTECTED PERSONAL INFORMATION):

• Name	• Residence Prior to Project Entry	• Domestic Violence
• Date of Birth	• Homeless History	• Mental Health
• Social Security Number	• Zip Code of Last Permanent Address	• Disabling Condition
• Gender	• Family Composition	• Alcohol & Drug
• Ethnicity and Race	• Employment Status	• Legal history/information
• Program Entry Date	• Veteran Status	• Photo (If applicable)
• Program Exit Date	• HIV/AIDS	
• Income and Non-Cash Benefits information (sources and amounts of household income, employment information, work skills)		
• Housing information (may include address, type of housing, homeless status, and reason for homelessness		

I UNDERSTAND THAT:

✓ Use of my likeness in a photograph will be viewable by other participating agencies and may be cropped or edited, as needed. I waive the right to approve or inspect the finished photograph.

✓ Information I give concerning physical or mental health problems will <u>not</u> be shared with other participating agencies in any way that identifies me.

✓ The participating agencies have signed agreements to treat my information in a professional and confidential manner. I have the right to view the client confidentiality policies used by the HMIS participating agencies.

✓ Staff members of the participating agencies who will see my information have signed agreements to maintain confidentiality regarding my information.

✓ The release of my information does not guarantee that I will receive assistance, and my refusal to authorize the use of my information does not disqualify me from receiving assistance.

✓ If I revoke my authorization, all information about me already in the database will remain, but will become invisible to all of the participating agencies.

✓ My records are protected by federal, state, and local regulations governing confidentiality of client records and cannot be disclosed without my written consent unless otherwise provided for in the regulations.

✓ Auditors or funders who have legal rights to review the work of this agency, including the U.S. Department of Housing and Urban Development may see my information

✓ Bitfocus, Inc. is Sacramento's HMIS Vendor. When Bitfocus works on the system, they may see my information.

✓ People using HMIS information to write reports may see your information. Researchers must sign an agreement to protect my privacy before seeing HMIS data. My private information will never appear in research reports.

✓ This authorization will remain in effect until I revoke it in writing, and I may revoke authorization by signing a "Consumer Revocation of Consent to Release Information form", but that cancellation will not be retroactive.

✓ Additionally, I understand that participation in data collection is optional, and I may choose not to participate.

✓ This release is valid for five years from the date of my signature below.

✓ I also understand that I may withdraw my consent at any time.

✓ I understand that my personal information will not be made public and will only be used with strict confidentiality.

<u>**Participating agencies:**</u> A list of the participating agencies within the Sacramento Homeless Management Information System may be viewed prior to signing this form.

List all Dependent children under 18 in household, if any (first and last names):

1._____ 2._____

3._____ 4._____

5._____ 6._____

7._____ 8._____

Please initial one of the following levels of consent:

_____I give authorization for mine and my dependents listed above, Protected Personal and relevant information **to be entered into the HMIS and <u>shared between participating agencies.</u>**

OR

_____I give authorization for mine and my dependents listed above Protected Personal and relevant information **to be entered into the HMIS, but <u>not shared between participating agencies.</u>**

OR

_____I do not consent to the inclusion of personal information in HMIS about me and any dependents listed above.

_____   _____
          Consumer's Signature   **Date**

List of Participating Agencies

Who is currently using the HMIS system in Sacramento County?

➢ Bishop Gallegos Maternity Home	➢ Sacramento Housing & Redevelopment Agency (SHRA)
➢ Bridges, Inc.	➢ Sacramento Recovery House, Inc. / Gateway
➢ Center for Aids Research Education & Svs (CARES)	➢ Sacramento Self Help Housing
➢ CommuniCare Health Centers	➢ Sacramento Steps Forward (SSF)
➢ Cottage Housing, Inc.	➢ Sacramento Veterans Resource Center
➢ Downtown Sacramento Partnership	➢ Saint John's Program for Real Change
➢ El Hogar Community Service, Inc.	➢ Salvation Army
➢ Elica Health Centers (Sacramento and Yolo)	➢ Sierra Foothills AIDS Foundation
➢ Loaves & Fishes	➢ Sunburst Properties
➢ Lutheran Social Services (LSS)	➢ TLCS, Inc.
➢ Mercy Housing	➢ Volunteers of America
➢ Next Move / Sac Area Emergency Housing Center	➢ Waking the Village / Tubman House
➢ Resources for Independent Living (RIL)	➢ WellSpace Health
➢ Sacramento Community Based Coalition	➢ WIND Youth Center
➢ Sacramento County Dept. of Human Assistance	➢ Women's Empowerment

Who is currently using the HMIS system in Yolo County?

➢ Davis Community Meals	➢ Yolo Community Care Continuum (YCCC)
➢ Fourth and Hope	➢ Yolo County Department of Health and Human Services
➢ United Christian Centers (UCC)	➢ Yolo Resource Center

Aliases

Participating agencies will make their best effort to record accurate data. Only when a client refuses to provide his or hers or dependent's personal information and the program funder does not prohibit it, it is permissible to enter client data under an alias. To do so, the agency must follow these steps:

- Create the client record, including any family members, under an assumed first & last name. It is highly recommended that agency have a set standard to use for last name. **Agency could use Agency's Acronym as a last name.**

- Set the date of birth to 1/1/XXXX, where XXXX is the actual year of birth

- For SSN use 999-99-9999

- Skip any other identifiable elements or answer them as "refused"

- **Make a notation** of the alias in the client file and include the corresponding **HMIS Client ID/Unique HMIS ID for future reference as it will be needed to access client record.**

If a client's record already exists in HMIS, the agency must not create a new alias record. Client records entered under aliases may affect agency's overall data completeness and accuracy rates. The agency is responsible for any duplication of services that results from hiding the actual name under an alias.

STARTING on CLARITY

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.

What is the cost to Partner agencies?

Every agency is expected to incur the cost of an Internet connection and Staffing.

The following web browsers are supported by Clarity:

- Microsoft – Internet Explorer 9
- Mozilla – Firefox 10
- Google – Chrome 17
- Apple – Safari 5.1.3

HUD Mandated Password Guidelines

Passwords must meet reasonable industry standard guidelines. By following the guidelines listed below, you will meet HUD and Clarity security standards.

Clarity users require a **unique username and password**. Your username will be assigned to you. Your UserID will usually contain your last name and first initial (i.e. SmithJ).

Please take this time to think of your new password, it <u>must meet</u> the following criteria:
- At least 8 characters in total length
- Contain an upper-case letter (i.e. H)
- Contain a lower-case letter (i.e. h)
- Contain a Number (i.e. 9)
- Contain a Symbol (i.e. $)
- Passwords **CANNOT** use or include; - the user name - the HMIS name - the HMIS vendor's name (Bitfocus/Clarity)
- Passwords **CANNOT** consist entirely of any word found in the common dictionary, or any of the above, spelled backwards. Your password should not even contain any common word.

Password Expiration

Your password will expire every 90 days. You will receive reminder e-mail 10 days prior to expiration. When your password has expired, a prompt window will appear when you try to log on to Clarity. You will need to choose a new password and enter it in the prompt window. You will not be able to re-use your current password.

Browsers and Passwords

<u>**NEVER**</u> let your Internet Browser store your login or password. Your browser may give you the option of storing your login or password on "this computer." NEVER USE THIS OPTION. It can give anyone using your workstation access through your browser. So, NEVER allow your computer to store your login or password.

HMIS Login Expiration

Your login will expire every 90 days. You will receive reminder e-mail 10 days prior to expiration. If you let your log-in expire it will send you e-mail letting you know that your login is expired. To reactivate your login you must send an e-mail to SSF HMIS staff.

Logging On To Clarity

How to LOG ON:

1. Open your web browser. (Internet Explorer, Firefox, Chrome, etc.)

2. **TURN OFF ANY "POP-UP BLOCKERS" NOW!**

3. Go to Website: **https://sac.clarityhs.com/**

4. Click with your mouse in the **username** field and type your assigned user name.

5. Click with your mouse in the **password** field and type your password.

6. Click on the [Sign in] button.

![stop figure] **If you attempt to log-in FOUR consecutive times with the wrong password, your account will become inactive. To reactivate your account, contact the HMIS Administrator.**

Note: The first time you log in you will be prompted to enter a new password, and type it in two times. Select a new password following the guidelines on Page 8. When you have entered and confirmed your new password, click on the [Sign in] button.

How to change Password and update E-mail Address
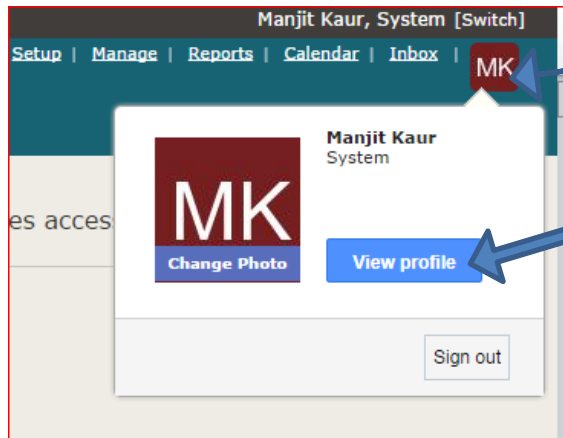
Click **"Your Initial"**

Then Click **"View Profile"**
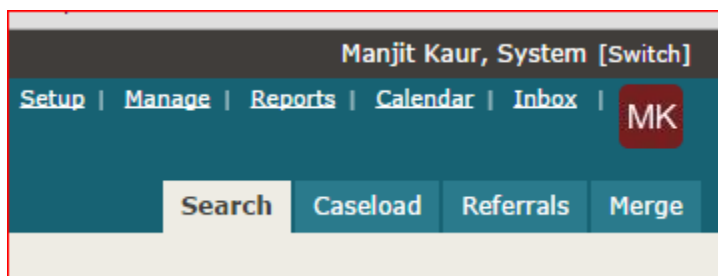
1. Enter your New E-mail Address
2. Select **"Save"**

1. Type in New Password
2. Confirm Password
3. Select **"Save"**

If "Enabled", system will auto suggest a password. If you want to pick your own password, select "Disabled"

Automatic Log off
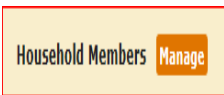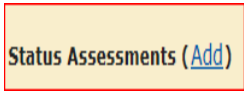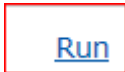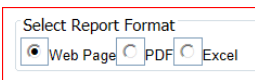
If you are logged into Clarity, but have been inactive for 30 minutes, you will be automatically logged off after 5 minutes of warning. A message like this will be displayed:
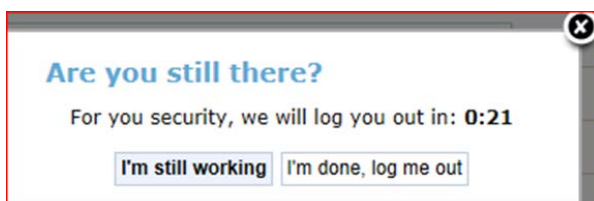
NOTE: If you are automatically logged off by Clarity for inactivity, the last page you accessed will remain visible onscreen. There is potential for a breach in client confidentiality.

Clarity ICONS: Common Clarity Icons

Clarity uses icons to assist you in completing tasks. The table below lists the most common icons you will encounter.

Icon	Name	Description
MK	HMIS User's Initials	Click on the icon to edit your HMIS User profile, change your password, update e-mail address, or "Sign Out"
(Client Search icon)	Client Search	Click on the icon to retrieve the full client search result.
(Add New Record icon)	Add New Record	Click on the icon to bring up a blank profile screen in order to add a new client into the database.
(Printer icon)	View as Print Friendly	This page or window can be printed. Click on the icon to open a "print friendly" window, and print. See Privacy Standard below.
Edit	Edit	Click on the icon to edit the record.
(Trash can icon)	Delete	Click on the icon to delete Assigned service. You will not be able to delete any enrollment/program history. Program Enrollment/History can only be deleted by the Lead Agency's HMIS Staff.
Household Members Manage	Manage Household	Click on the icon to Add, Join, and Exit Household members.
Program Group Members (Add)	Enroll Group Members	Click on Icon "**Program Group Members (Add)**" to **Enroll** Program group members.
Status Assessments (Add)	Add Status Update	Click on Icon **Status Assessments (Add)** to **add/update** client's Program status. (Status update must be completed Every **3 months** for Emergency Shelters, **6 months** Transition Housing Programs, **Annually** Permanent Supportive Housing Projects.
(Calendar icon)	Choose Date	Choose a date using the calendar tool.
Run	Clear Date	Click on Icon to RUN reports
Select Report Format (Web Page, PDF, Excel)	Report Format	Select the Report format **before clicking** [OK] Note: Some "Web" reports allow you to drill down to see client list.

Step 1 - Searching For A Client

Reduce Duplications in HMIS

The burden of *not* creating duplicate records falls on each participating agency. In order to reduce the duplication of client records, **HMIS Users should always search for the client in HMIS before creating a new client record**. If matches are found, the user must determine if any of the records found, match their client. Having multiple (duplicate) records in the database for a single client causes confusion and inaccurate information being stored.

Search for a Client

In order to view a client's information, or to add or edit their information, you must first locate the client. Your search to determine if the client already exists in the HMIS system needs to be thorough. If you don't do a thorough search, the likelihood of creating a duplicate client record is very high.

- Keep in mind that if a client was entered by another provider in the HMIS system, it's possible that an alias was used, or the name could be spelled differently. This is why we **ALWAYS SEARCH ON PARTIAL SOCIAL SECURITY NUMBER FIRST**.

DO NOT SEARCH ON FULL NAMES - LESS IS MORE!

The fewest letters used in searches will find the most possible matches.
This helps prevent duplicate clients being entered due to misspellings!

Search Criteria

Before entering a NEW client, you must search to insure that the client does not already exist in the database. To search for a client in Clarity, complete these **separate** searches in the order listed below:

1. Enter a **Partial Social Security Number** (the last four digits of the SSN). Click On 🔍
   (If client found, record the client ID. If client not found, `clear search window`, conduct next search)

2. **If no possible matches show up on the Social Security number search, next search on partial name and partial alias, separately, using the fewest letters possible.** Enter **Partial First Name** and **Partial Last Name** (3 letters from first name and 3 letters from last name). Click On 🔍
   (If client found, record the client ID. If client not found, `clear search window`, conduct next search)

   I.E. If you are searching for **Michael Jones**, entering a **mic jon** in the search field makes it much easier to find the correct client. See example below:

3. You also have the ability to search using the last four SSN digits or a combination of the client name and SSN (mic jon 2333) OR by date of birth (09/20/65).

Remember Less is More!

STEP 2 - Editing or Adding New Client

Editing a Client found in Search

If, after a thorough search, you have determined that your client exists in HMIS follow the steps below:

- **To select a client from your search results, mouse over the client you would like to select to produce an "EDIT" option.**

- <u>Click on **"Edit"** to open the client file.</u>

- **Update the profile screen with current information.**
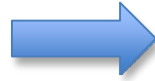
Note If a client has changed their last name, update the record and include the previous last name on the "Alias" line. In the "Notes" tab, indicate the old last name and the documentation you saw to validate the name change (DL, SSC, etc.)

Adding A New Client (if client is not in the system)

If, after a thorough search, you have determined that your client does not exist in HMIS, the Client would need to be created. To create a Client:

- **Click** The [icon] icon in the upper right corner of the Search screen.
  In this example, we are entering client Jody Smith.

SEARCH FOR A CLIENT

> jod smi   Search

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

Steps To Remember Before Entering A Client Into HMIS!

STEP 1: NEVER add a client to the HMIS system without the proper signed HMIS Consumer's Consent & Release of Information Authorization. Review the consent before entering into HMIS to protect the client's privacy rights.

STEP 2: SEARCH for client record to reduce duplication in HMIS!
In order to reduce the duplication of client records, HMIS Users **should always search multiple ways** for the client in HMIS before creating a new client record. Once you have determined that the client is not currently entered in the system, AND you have the Intake form and signed consent in front of you, you are ready to add the new client record.
If the client doesn't want his or her information shared with Partner Agencies, then make sure to make the record "PRIVATE".

STEP 3: ALWAYS keep the "Data Quality" in mind!

Your search - **"jod smi"** - did not match any client.

- Complete <u>ALL</u> fields on the following Intake screen with the proper response and click "Add Record" at the bottom of the page when you are finished. All fields <u>REQUIRE</u> complete data.

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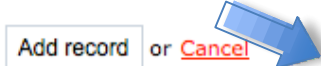
- If any of the required HUD Universal Data Elements have been left blank, you will be unable to save/create the file. These fields will be highlighted in red for your attention:

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

Client Profile

Social Security Number	530 – 99 – 9999	
Quality of SSN	Full SSN Reported	
Last Name	Smith	
First Name	Jody	
Date of Birth	12/30/1964	
Quality of DOB	Full DOB Reported	
Unique Identifier	EC08528D6	
Gender	Select	

- Complete the missing fields and click "Add Record" to create the file.

- If you do not have the complete Zip Code of Last Address, you may estimate the zip code, and complete the remainder with 0's. i.e. 95000 for Sacramento/Yolo.

    Please review your intake to insure accuracy and completeness.

- Most data elements include a **'Client doesn't know'** or **'Client refused'** response category. These are considered valid responses if the client does not know or the client refuses to respond to the question. It is not the intention of the federal partners that clients be denied assistance if they refuse or are unable to supply the information. However, some information may be required by projects or public or private funders to determine eligibility for housing or services, or to assess needed services.

- The 'Client doesn't know' or 'Client refused' responses should not be used to indicate that the case manager or data entry person does not know the client's response, response category *"Data not collected"* must be used. In such cases, that response category will be treated as missing data for reporting purposes.

Step 3 (Households and Families ONLY) SKIP for Individuals

When adults or unaccompanied minors are seeking services together, they can be entered as a **household** in Clarity. A couple or people seeking services together do not need to be married to be entered in a **household**. For example, an adult, sibling, and grandma may seek services together. They would be entered as a **household**.

A parent seeking services with his/her children are always entered as a **household**.

These are two key situations for entering clients as a household. **In order to be counted as "Family Members" in the HUD APR, clients must be entered in a household** BEFORE **enrolling in the Program.**

Types of households

- **Head of Household:** data collection is limited to the head of household. Head of household is the term used in these standards for consistency with other guidance previously developed and does not necessarily indicate the individual's status in the household. CoCs and HMIS Lead Agencies may elect to further define the head of household for their jurisdiction or may also substitute the concept of "primary client" for the term.

- **Head of Household and Adults**: data must be collected about the head of household and each additional adult in the household. If the household is composed of an unaccompanied child, that child is the head of household. If the household is composed of two or more minors, data must be collected about the minor that has been designated as the head of household.

    Where a group of persons apply for services together (as a household or family), information about any children under the age of 18 may be provided by the head of household who is applying for services. The children are not required to be present at the time the head of household applies for services. However, information should not be recorded for children under age 18 if it is indicated that these children will not be entering the project on the same day as the head of household. Information for these children should be recorded when the children join the project. Information on any other adults (18 years of age or older) who are enrolled in the project as part of the household should be obtained directly from that adult. As a general rule, one adult should not provide information for another adult. A project should edit the project entry record of a client who turns 18 after entry, but before exit, to add a response for data elements only relevant to the head of household and other adults in the household in order to improve the reported overall data quality for the project or if required by a funder.

- **All Clients**: data must be collected about each adult and child in a household

Creating Family/Household Groups

- Begin by verifying that each family/household member exists in HMIS. If they do not exist, complete the above steps for **"Adding A New Client"** to create a file for each family member. Open the file for the "Head of Household". In the upper right corner, under the header "Family/Household Members", **click** "Manage".

Family / Household Members `Manage`

No active members

- 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.

In this example we are adding **Angel Flower**.

Your recent client searches accessed:

Angel Flower	7777	Add
John Smith	4532	Join

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 clients group, you are being 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 screen. From the search results, mouse over the client name to produce the **"Add" option**.

Search for a Family / Household Member

ang flow

Enter your search terms above to search for a client. Use full combination.

Add   Angel Flower

Add to Family / Household

Member Type	Daughter
Start Date	03/12/2012

Save

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

Note: 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. (The Head of the Household will be indicated with a star next to their name)

Family / Household Members

Jody Smith	Mother	Edit
Angel Flower	Daughter	Edit
Joe Flower	Son	Edit

When a Member Leaves the Household

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.

This will remove them from the household and retain a historical record of their time in the group.

Edit

Member Type	Son
Head of Household	Jody Smith
Start Date	01/01/2010
End Date	02/10/2012

Save

Family / Household History

	Member Type	Member Start	Member End
Joe Flower	Son	01/01/10	02/10/12

In this example we have ended Joe Flowers time in the household as of 2/10/12

STEP 4 - Enrolling Clients into Programs

The Programs tab in the client file contains following sections:

Program History provides a listing of programs your client is either currently enrolled in or has been enrolled in the past.

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

To enroll a client/household into a program:

- **Select "Enroll" next to the applicable program title under "Programs: Available"**

PROGRAMS: AVAILABLE

LSS - Single Adults (40)	PH - Permanent Supportive Housing (disability required)	∨
LSS - TAY Families (15)	PH - Permanent Supportive Housing (disability required)	∨
Next Move - Adult Families (20)	PH - Permanent Supportive Housing (disability required)	∨
Next Move - Seniors (40)	PH - Permanent Supportive Housing (disability required)	∨
Wind - Single TAY (12)	PH - Permanent Supportive Housing (disability required)	∨

PROGRAM DESCRIPTION:

Step Up Sacramento (SUS) is a PSH collaboration between 3 Agencies to serve chronically homeless. This scattered site model will house 40 Seniors (55+) (possibly with a partner/spouse).

Occupancy (Today)
0
UNIT

Referrals (90 Days)
2
REFERRALS

☐ 100 % Available

☐ 100 % Referrals Pending

Funding Source
HUD:CoC - Permanent Supportive Housing

Service Categories:
- ✓ Transportation
- ✓ Case Management
- ✓ Housing
- ✓ Life Skills
- ✓ Housing Search and Placement
- ✓ Alcohol and Drug Abuse

HOUSING AVAILABILITY:

▶ Housed with Step Up Sacramento (Next Move): Seniors (40)   40 Beds in 40 Units

☑ Program Placement a result of Referral provided by Sacramento Steps Forward

Include group members:
☐ **Angel Flower**   Not Set

1 pending referral(s). Oldest 20 days.

Print Directions   Doc Requirements   Enroll

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"**. In this example we are enrolling both Jody Smith and her daughter Angel Flower.

If the enrollment is the result of a referral, the box to the left will have a blue checkmark, please keep this box checked to ensure the referral results are properly tracked.

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 below, required program fields were left blank illustrating required data elements in order to save the client enrollment. If required field is left unanswered, the enrollment will not save and message shown below will appear.

- 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 has been completed. Continue to click **"Save & Next"** after completing each group members Enrollment. Enrolled group members will be listed in the right side bar under **"Program Group Members"**.

What to do if family member joins the family/Individual later during the program stay?
- All additional members must be enrolled through the "Head of the Household"
- To Enroll the additional member to the group:
  o Click on "Head of the Household" file
  o Click on "Program Tab"
  o Scroll over the program name and "Edit" icon will appear. Click "Edit" and screen below will appear.

  o Click "Add" Program Group Members. The screen below will appear with the list of available members to be enrolled.

- **Select additional member**(s) to be enrolled and **click "Enroll". Enrollment screen will popup.** Complete ALL fields in the enrollment page for your client and click **"Save & Next"**.   If there are more than one group member selected, their Enrollment page will automatically come up next until each member has been completed.

Make Program Private

In the event client doesn't want to share their information with other agencies, it's the responsibility of the user to make their program private**.**

To make the program private:
- Click on program tab
- Select the program by **Scrolling over the program name and "Edit" icon will appear. Click "Edit"**

- Once in the program's screen, locate the "Assigned Staff" on the upper right portion of the screen and click on pencil icon and small screen will appear.

- Click on the "Make Program Private" box and then "Save Changes". You must follow the same steps for all household members.

STEP 5 - Linking Program Services

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** and any Expense associated with the service. If applicable verify that the proper funding source is selected and checkmark any group members who should also receive this service. The service **"END DATE"** must be **projected way out into the future** to avoid being disabled prior to client exit. For Example; if your program is 90 days and gives extensions, it's safer and best practice to extend the services few additional months upon program entry. **All services "End Date" MUST be updated and should not exceed client's actual program exit date. All active services will appear at the bottom of the exit screen.**

- Click **"Submit"** to complete the service placement. In this example we have placed only the head of household with HPRP Case Management.

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

Note: An **"Auto Enroll Services"** is a great feature that could be enabled to automatically place clients into to service(s) upon program enrollment. If your agency is interested in this feature, contact HMIS Administrator. Please note that not all services can be set to **"Auto Enroll"** because not all services are provided to both children and adults.
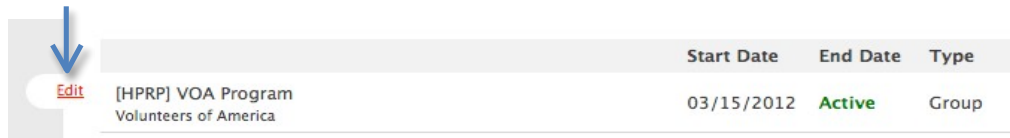
When you have finished, both the program enrollment and associated services should be visible from the Program History

Note: **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"**.

		Start Date	End Date	Type
Edit	[HPRP] VOA Program Volunteers of America	03/15/2012	Active	Group

Select **"Provide Services"** and follow the above steps for Placing Services.

Program: [HPRP] VOA Program

| View Enrollment | Program History | Provide Services | Goals | End Program |

NOTE:
From the client profile, you can also access the existing program entry to place services and complete assessments from the right side menu of your screen. Under the header "Active Programs" locate your program and click **"Edit"**.
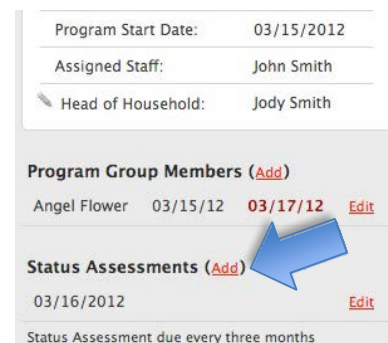
Active Services
[HPRP] Case Management: Case   Edit

Active Programs
[HPRP] VOA Program   Edit

Recent Services
Transportation: Buss Pass   Edit

STEP 6 - Completing Status / Annual Assessments

Depending upon the funding source for your program, you may be required to complete Annual Assessments at regular intervals for all active clients. Annual Assessment are required for Permanent Supportive Housing Projects and are to be completed anytime from 30 days prior to 30 days after the anniversary of the client's project entry date. Status Assessments may be completed at any time to capture significant changes for the client. They are also required for Rapid Re-Housing projects (See Step 7).

- From the Programs tab, the right side menu contains the header **"Status Assessments"**.

- Click **"Add".** A box will appear asking if you want to complete either a **Status** or **Annual** Assessment.

Program Start Date:	03/15/2012
Assigned Staff:	John Smith
Head of Household:	Jody Smith

Program Group Members (Add)
Angel Flower   03/15/12   **03/17/12**   Edit
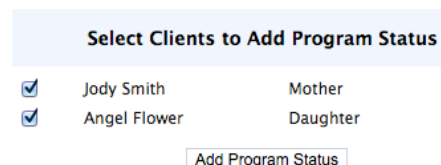
Status Assessments (Add)
03/16/2012   Edit
Status Assessment due every three months

GROUP "Status Assessments"

<u>If this is a group case</u>, 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 Clients to Add Program Status
☑ Jody Smith   Mother
☑ Angel Flower   Daughter
Add Program Status

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**, <u>additional members' assessment/program status screens will appear until each has been completed.</u>

Making Changes to completed assessments "Status Assessments"
Completed assessments can be viewed and/or edited from the right side menu.

How do I receive 'Status Assessment Due' notifications?
To receive 'Status Assessment Due' notifications:

- Click on program tab
- Select the program by **Scrolling over the program name and "Edit" icon will appear. Click "Edit"**
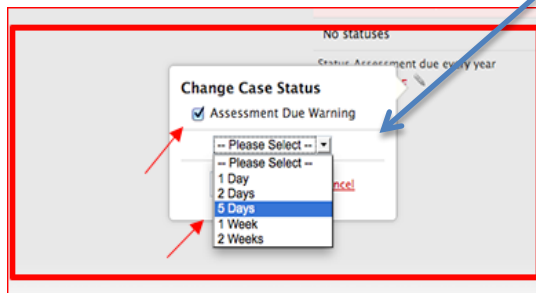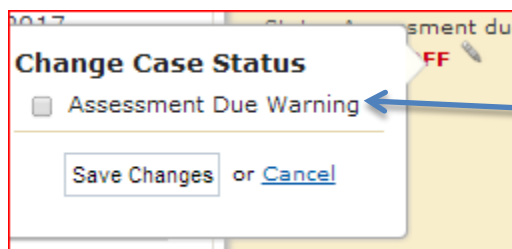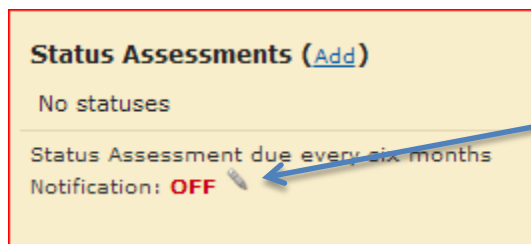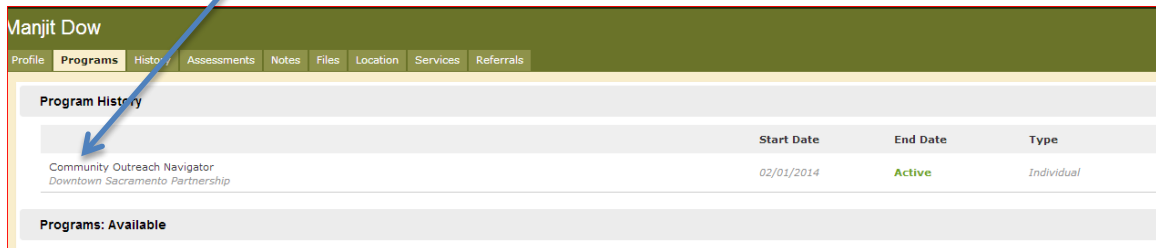
- Once in the program's screen, locate the "Pencil Icon" on the lower right portion of the screen and "click" on pencil icon and small screen will appear.

- Click on "Assessment Due Warning" and select. Next, select the timeframe within which you would like the email to be sent. For example, if you select '1 Day', then the email notification will be sent to the assigned staff member 1 day prior to the status assessment due date, and if you select '2 weeks' then the email notification will be sent 2 weeks prior to the status assessment due date.

Once the email has been sent, the staff member can simply copy/paste the unique identifier into the client search bar to quickly locate the client record.

STEP 7 – Rapid Re-Housing Programs

Rapid Re-Housing programs have additional steps to complete after they have enrolled a client into their program (enrollment date is the date you being to work with the client to find housing).

- Once a client or a family finds a rental and they have signed a lease to move-in, it is required that go into their program and complete a **Status Assessment** (for all family members if the program serves families, See Step 6). On this Assessment, you will check the "In Permanent Housing" box and a date box will appear for you to enter the date they were able to move in.

- Next, you are required to set their "Rental Assistance" service to show a bed is being paid for by your program (again, set for all family member if the program serves families). This option can be found under the "Provide Services" Tab (See Step 5 for additional information). When you open the option to set the service by clicking the down arrow, it will give you the option to enter the date the client moved in, as well as an end date. For the end date, ALWAYS select an option for further out then your program provides. This will keep the service active until you exit the client from your program. This is also where you will enter the amount of rent your project paid for that first month. After you have entered the information and selected your family members (if applicable), click submit.

- The "Provide Services" Tab is also where you will also capture any other fees for your program paid (security deposit, application fee, utilities, etc.).

- Going forward, to add the rent your project pays each month, you will go into the "History" tab of your project, and then "Edit" the Rental Assistance Service.

- In the middle of the service history screen that appears, there will be a section showing the expenses entered, you will click the "Add Expense" option on the right (See Page 41 for additional information regarding this screen).

HISTORY: EDIT

Service Name	Mather Reallocation- HUD RRH Rental Assistance
Service Item	Families
Category	Housing
Delivery Type	Long Term
Agency	Volunteers Of America (Entered by: Sara Christian)
Expiry Warning	☐
Start Date	03/01/2017 📅
End Date	06/01/2018 📅
Private	☐

Save changes   or *Cancel*

PROGRAMS

	Agency	Start Date	End Date	Type
VOA - Mather Reallocation- HUD-Family- RRH	Volunteers Of America	02/28/2017		Group

EXPENSES ($435.00)   Add expense

Funding Source	Agency Name	Expense Date	Amount
No Funding	Volunteers Of America	03/01/2017	$435.00

- This will bring up a box for you to input that month's rent information, including the amount and the date paid. Click "Save" when you are done entering. You will need to do this each month that your program is paying any part of the rent for the client.

ADD EXPENSE

Funding	No Funding
Amount	$ 435
Expense Date	04/01/2017 📅
Check Number	
Vendor	
Notes	

Save

STEP 8 - Exiting a Client from a Program and Services

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

	Start Date	End Date	Type
JT Eligibility Sacramento First	10/02/2012	Active	Group
Employment Training Sacramento First	10/02/2012	Active	Individual
JT Eligibility Sacramento First	10/01/2012	10/01/2012	Group
🗑 Edit [HPRP] VOA Program Volunteers of America	03/15/2012	03/17/2012	Group

Family / Household Members Manage

Angel Flower	Daughter	Edit

Active Services

No active services

Active Programs

Employment Training	Edit
JT Eligibility	Edit

If this is a group case, you will be prompted to select which household members you would like to exit from the program.

Select Clients to Exit from Program

☑	Jody Smith	Mother
☑	Angel Flower	Daughter

End Program

- 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.

STEP 9 - Ending Open Services

- **All services "End Date" MUST be updated and should not exceed client's actual program exit date. All active services will appear at the bottom of the exit screen. At the bottom** of the screen under the header **"Open Services"** make any needed adjustments to the service dates associated with the program stay.

Open Services

Service Name	Agency	Start Date	End Date
[HPRP] Case Management: Case	Volunteers of America	03/15/2012	03/17/2012

Save & Next or Cancel

- If you had check marked any group members to also be exited from this program, their End Program page will automatically come up next until each member has been completed. Continue to click **"Save & Next"** after completing exit information for each group members.

- Rapid Re-Housing Projects will need to put in the correct end date for their "Rental Assistance" Service. If you chose and exit date further out when you set the service, it should appear for you at the bottom of the screen and will pre-populate with the date prior to the program exit date you entered (signifying the last night the client occupied a bed paid for by your Agency).

OPEN SERVICES

Service Name	Start Date	End Date	Change End Date
County ESG-Case Management:Family Volunteers Of America	10/05/2016	10/05/2017	5/31/2017
County ESG-Rental Assistance:Family Volunteers Of America	02/01/2017	02/01/2018	5/31/2017

Working With The Referrals Tab

Sara Christian , System

Search   Caseload   Referrals
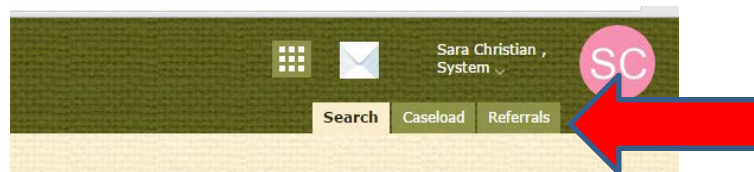
This section details the most common tasks performed in the Referrals section:

- How to View a Client from the Pending tab
- How to Place a Client as "Pending - In Process"
- How to Deny a Referral
- How to View Completed and Denied Tabs

REFERRALS

Pending   Community Queue   Completed   Denied   Sent

Pending Referrals

Search

Mode   Standard

☐ Eligible Clients Only

Search

How to View a Client from the Pending Tab

When a referral is sent to your Agency and you are the person that has been identified to receive the referrals for a project in the system, an email will come to you that includes the Unique Identifier (UI) of the client that is being referred. Paste the UI in the search box in the Pending tab. To work with that client in the Pending tab of the Referrals section, mouse over the Client Name (e.g. Willie Winston):

- **Selecting the "Edit" link** will take you to the actual Referral where you can view the referral, any notes along with it, place the person as "Pending - In Process," or deny the referral and send it to the Community Queue tab.

- **Selecting the client name** will take you to the Profile screen of the client record. This is where you will enroll the client into your project once you have housed them.

How to Change the Referral Status to "Pending – In Process"

(**For PSH Projects Only**) If your project does not move the client in the day of your intake appointment, you will need to utilize the "Pending - In Process" option to update the status of the client. This lets the Coordinated Entry team know that you have met with the client and determined they are a good fit for your project and that you will be continuing to work with them to secure their housing. After opening the referral by selecting the "Edit" link, you will use the drop down to change the status to "Pending – In Process" then click "Save Changes".

After you save the change in their status, scroll down to the "Notes" section and write a brief note. Select the "Send Note" button to save it. **Enter a note weekly during the process between your intake appointment and when you secure them housing and enroll them into your project.**

Note There is never a reason that you will need to use the "Referral Connections" section of this referral screen.

How to Deny a Referral

If you need to deny a referral, including because a client is refusing your services, go into the Pending tab in the referral screen open the referral by selecting the "Edit" link.

- You will use the drop down to change the status to "Denied," which will trigger the additional boxes to appear: Send to Community Queue, Denied Reason, Denied Message, and Private.

- **Set the "Send to Community Queue" box to Yes.** All denied referrals must be referred back to the Queue in order for them to be referred to another project.

- Then, at "Denied Reason" select the answer from the drop-down menu that best fits why your Agency is denying the referral. Once you have made the appropriate selection, write a note in the "Denied Message" with more detail as to exactly why the client is being denied from that project (Do Not Check the "Private" box). Click "Save Changes".

- You will also need to upload a denial letter into the system that can be given to the client. Upload this in the "Files" tab of the client's profile page.

Working With The Additional Tabs

In addition to the Pending tab, you will also see four additional tabs that are available for you to view data in.

REFERRALS

Pending   Community Queue   Completed   Denied   Sent
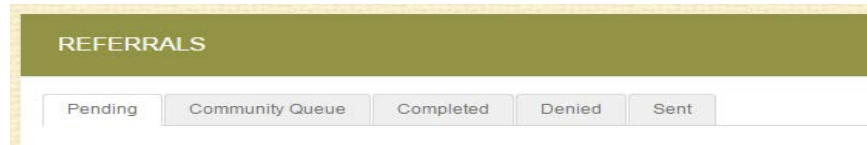
Community Queue: This tab shows the name of every client in the *full* Community Queue and is managed by SSF. *You will never need to work in this tab*

Completed: This tab shows the name of every client that was referred to you and that you have accepted into your project by completing an enrollment in the system.

Denied: This tab shows the name of every client that was referred to you and that you have denied in the system.

Sent: This tab shows the names of clients that your Agency referred. We *do not* have direct referral between Agencies at this time and we are only using the Community Queue that is managed by SSF. *You will never need to work in this tab*

Additional System Features

Adding A Client Photo

Uploading photos to your client files can provide a quick method of identification.
- Save a digital photo of the client to your computer.
- From the Client Profile screen, select **"Update Photo"** in the upper right section.
- Click **"Select File"** from the Upload Photo screen.
- Locate and select the photo from its location on your computer.
- Click "Upload"
- Using your mouse, define the area you wish to use in the original picture by dragging the outline as desired. The image on the right will display a preview of your selection.
- Click **"Save Picture"** when you are satisfied with the completed image.

Original   Profile Picture Preview

Save Picture
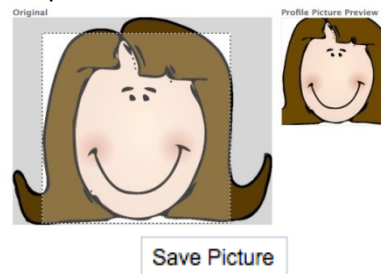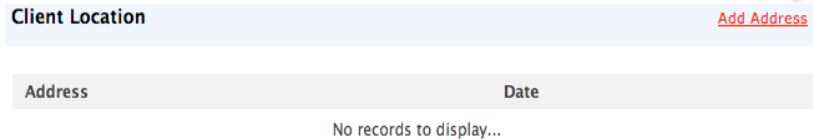
Your saved photo will now be visible from the Client Profile screen.

Client Profile   General Intake - REAL

Social Security Number	530	99	9999
Quality of SSN	Full SSN Reported		
Last Name	Smith		
First Name	Jody		
Date of Birth	12/29/1964		
Quality of DOB	Full DOB Reported		
Unique Identifier	EC08528D6		

Update photo

Location Tab - Adding an Active Address or Contact Information

- Click on the "Location" tab in the client file.
- Click **"Add Address"**.

Client Location   Add Address

Address	Date

No records to display...

- Complete contact information and Click **"Add Record"**.
- You will be notified at the top of the screen that your record has been saved.
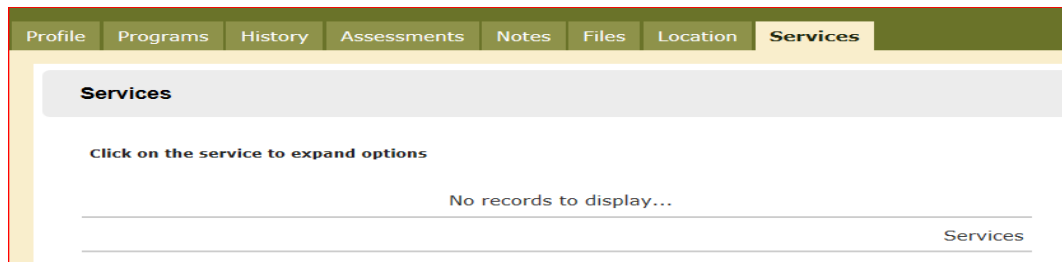
✔ Your changes have been saved successfully.

Client Location

Address Type	Home
Name	Jody Smith
Address (line 1)	123 Hope Street
Address (line 2)	Apt. 12

Clarity HMIS utilizes Google Maps to chart the location of your client. After adding an active address, that location will be visible in the map on the Location tab. The location of your agency will also be shown.
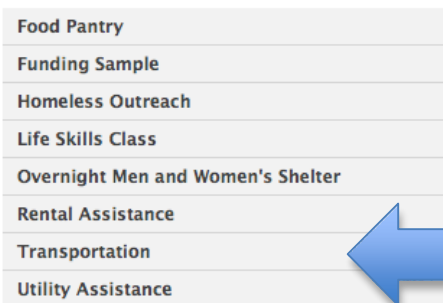
General Service Transactions

A general service transaction is placed through the "Services" tab. It records the provision of **a service to a client that is not part of a Program**.

Profile	Programs	History	Assessments	Notes	Files	Location	**Services**

Services

Click on the service to expand options

No records to display...
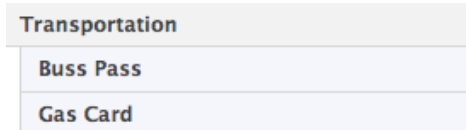
Services

- Click on the **"Services"** tab in the client file. This will produce a list of services that your agency is currently entering/tracking in Clarity HMIS.
- Click once on the service you wish to provide.

Food Pantry
Funding Sample
Homeless Outreach
Life Skills Class
Overnight Men and Women's Shelter
Rental Assistance
Transportation
Utility Assistance

For this example, we will be placing the client with a Bus Pass for one day by first clicking on **"Transportation"** from the list of available services.

- From the drop down menu that appears, click on the section for the service you are providing, in this case it will be Bus Pass.

Transportation
Buss Pass
Gas Card

- Enter the **Start and End Date** that is accurate for the time the service was provided. If this is a one day service, the Start and End Date will be the same date.

Important: If your client is part of a family/household group, you have the option to check family members who should also receive this service placement. Checking any family members listed will place an identical service placement in that members HMIS history.

NOTE: All service placements **MUST have a valid end date**. Failure to enter an end date will produce a one day service placement, which may not be accurate for all of your service placements. It is **"Highly Recommended"** that you project the service end date way out into the future.

Daily Attendance 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.

To begin working with client attendance, go to the ⊞ icon located at the right side of the main search screen. Select "Attendance". This will take you to the Attendance screen where you will find a list of the attendance-based services in your agency.
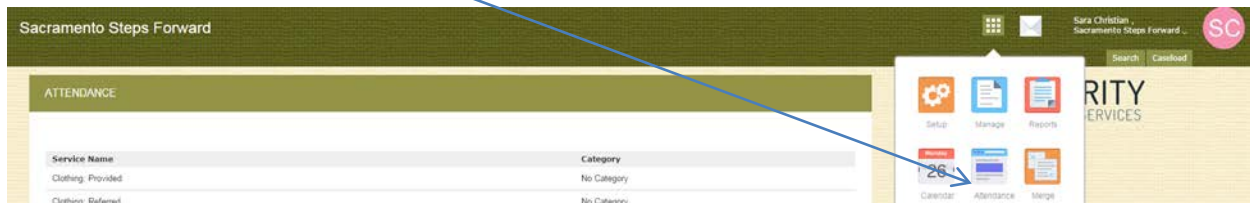
NOTE: You will only have an *"Attendance tab"* if your agency provides services that have been setup for daily intake.

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

Select the desired service from the list by clicking on **"Manage"** when you mouse over the service title.

Important: Selecting **'Manage'** will take you to the attendance screen for that particular service. It will automatically default to the current date. If needed, you can change the date by selecting the ▣ calendar icon. The screen will adjust to list the attendance information for the given date.

The Service Attendance screen is divided into 3 sections:

- The 'In **Attendance'** box is located on the left side of the screen. This is where you will place the clients who received the service on the given date.

- To the right of this box is the list of clients who have **received this service at any point in time during the past 4 months.**

- On the far right side of the screen is the **client search box**; here you can enter a client name or part of the name for clients who have not received the service within the past 4 months. You can also easily manage household attendance here as well.

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-months roster to the "In Attendance" roster on the left.

Note 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.

- In this example we have placed Jody Smith and her daughter, Angel Flower, into attendance.

- They will now also be listed on the "last 4-months" roster for future dates.

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 20 to create a file for your client prior to attempting to place them into attendance for services.

Using Scanner to Enter Clients

If your agency is using a scanner to enter clients into service, use the Unique Identifier Scan Upload located at the bottom of the Attendance screen to upload your data file.

Unique Identifier Scan Upload

| CSV Data File | Select File | | Process |

Adding a Cost to Services

- Services can be set to automatically prompt users to enter a cost at the time of placement. This setup provides the easiest and quickest method of adding a cost to your placements and can include a set or adjustable dollar amount.
- With automatic cost association, the drop down during placement will have a designated cost option:

Transportation
Buss Pass
Gas Card

Start Date:	03/14/2012	End Date:	03/14/2012	Include group members: Angel Flower
Expense Amount:	10.00	Expense Date:	03/14/2012	
Funding Source:	No Funding Source			Submit
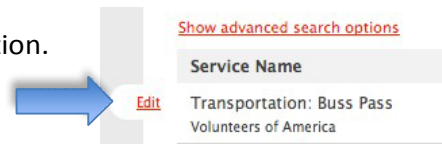
- In this example a $10.00 cost is automatically associated to every placement for **"Gas Card"** with no particular funding source being used.
- Funding sources can also be monitored in Clarity HMIS. Depending on the setup of the service, this may be adjustable, or automatically set to a predetermined funding source.
  - When an automatic cost prompt has not been set for your services, individual costs can still be added after a placement has been made.

Locate the service placement in the History tab of the clients file.

Mouse over the service title to produce the "Edit" option.
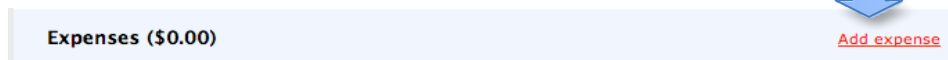
Show advanced search options

Service Name

Edit   Transportation: Buss Pass
Volunteers of America

Under the **Expenses** section, click on **"Add expense"**.
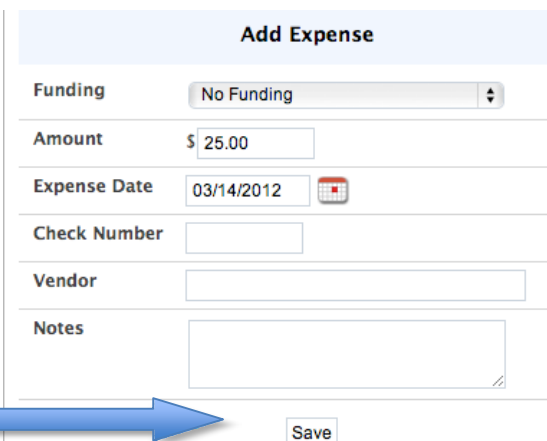
Expenses ($0.00)   Add expense

Complete the desired fields on the **"Add Expense"** popup screen.

You have the option to enter (and run reports on) the following fields:

Add Expense

Funding	No Funding
Amount	$ 25.00
Expense Date	03/14/2012
Check Number	
Vendor	
Notes	

Click **"Save"** and your expense will now show in the service history record.

Save

Program Tab Overview

Enrollment – Opens the enrollment screen that was completed at entry.
History – Shows the history of the client's services associated with this specific program.
Provide Services – Allows placement of services associated with the program.

Notes – Allows you to enter case notes that can only be seen by your Agency.
Files – Allows you to add files that can only be seen by your Agency (Do NOT use the option to upload files for Coordinated Entry).
Forms – Allows you to add forms that can only be seen by your Agency (Do NOT use the option to upload files for Coordinated Entry).
End – Opens the exit screen to be completed when the client leaves your program.

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.

Option to add Assessments or edit/view existing Assessments.

History Screen Overview

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

- Programs provided to the client will appear in a light tan tone to separate them from regular service transactions.

Winter Sanctuary Winter Sanctuary	12/29/2016	Active

- Assessments conducted will appear in a light gray.

Sacramento - VI-SPDAT Prescreen for Single Adults VOA - A Street Shelter	04/18/2016

- Referrals will appear in blue.

Referral: Community Queue VOA - A Street Shelter referral to Community Queue	06/27/2016	Pending	🖨
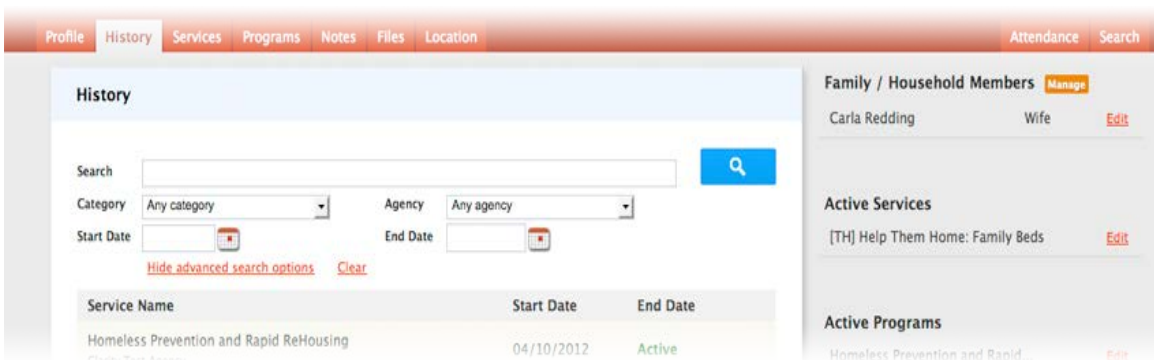
Service **transactions with attached expenses** are marked with a comment icon at the right of the listing. Hover your mouse over the icon, and additional financial details are displayed. This includes the total expense amount, and the funding source the expense was applied to.

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 option 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, add household members. Clicking **"Edit"** on a Program will place you directly into Program management.

The Service **Edit screen** contains the following:

Service details including **Start** and **End** Date

Expenses associated with this service

Option to add notes to this service

If this is a group placement, you have the option to edit the member's service also

Attendance – Services utilizing the Multiple Attendance or Attendance delivery method will be presented with the Attendance section at the bottom of the service history page. The section will list in a scrollable area of individual date entries. You may check a batch of dates, and click the **"Delete selected records"** link, or you may click the trashcan icon on individual dates. Selecting "Also apply to the following group members" will also delete individual entries from the group member for this service if any were in place.

Adding 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"**

Client Notes   Add Note

Title	Agency	Staff	Date

No records to display...

- **Enter the Title**, Date and Body of your note and click **"Add Record"** to save.

Title	Intake Note
Agency	Volunteers of America
Date	03/14/2012
Note	Bold	Italic	Numbers	Bullets

Bold Text

Italic Text

Bullet Points

- text
- text

Numbered Points

1. text
2. text

Add record or Cancel

Within the body of your note, you have the ability to use bold or italic text and bullet or numbered points.

- Saved **"Case Notes"** will be displayed by date. Mouse over to open/edit.

	Title	Agency	Staff	Date
	Home Visit Notes	Volunteers of America	Tauri Royce	2012-03-15
Edit	Intake Note	Volunteers of America	Tauri Royce	2012-03-14

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 resembles the type of file you are uploading.

Upload a File

Category	Personal Identification
Name	Birth Certificate
File	Select File
	Trouble attaching files? Switch to the Basic Uploader
Private	☐

Add record or 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.

- **To make Record Private** – Check the small check box. When checked, the file becomes Private and only your agency will have the ability to view the file. When unchecked, regular Sharing rules for your agency apply.
- **Click "Add Record"** to complete the upload and save.

The file will be listed by category and name with a small thumbnail image.
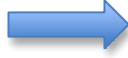
Personal Identification: Birth Certificate
View | Upload a New Version
PDF by John Smith on 15 Mar, 2012, 89.2 KB
Volunteers of America

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…)**

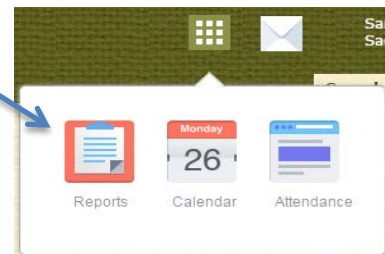## How To Work With The Report Library
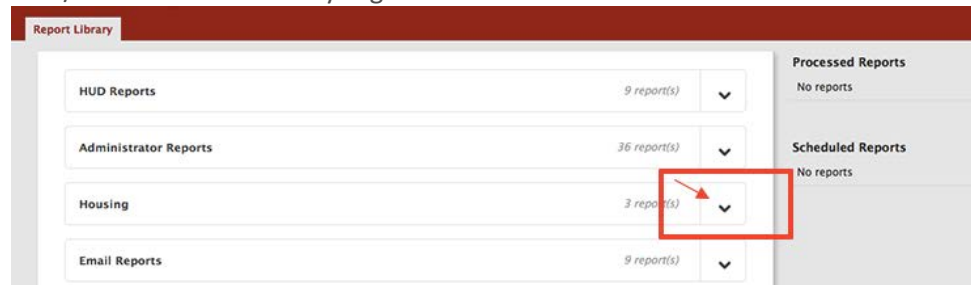
Running a Report

To run (or schedule) a report, select the ⊞ icon in the top right corner of the screen (this link is accessible from any screen).

This will give you a drop down that will reveal your reports icon.

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.
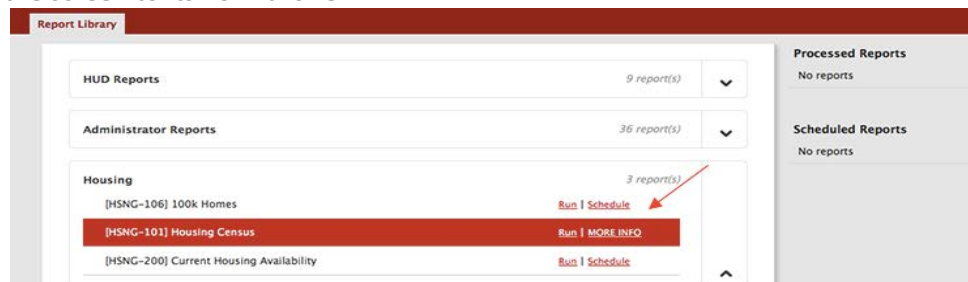
For more information on a particular report, select the 'More' link. The screen will expand to include a summary of the purpose of the report.
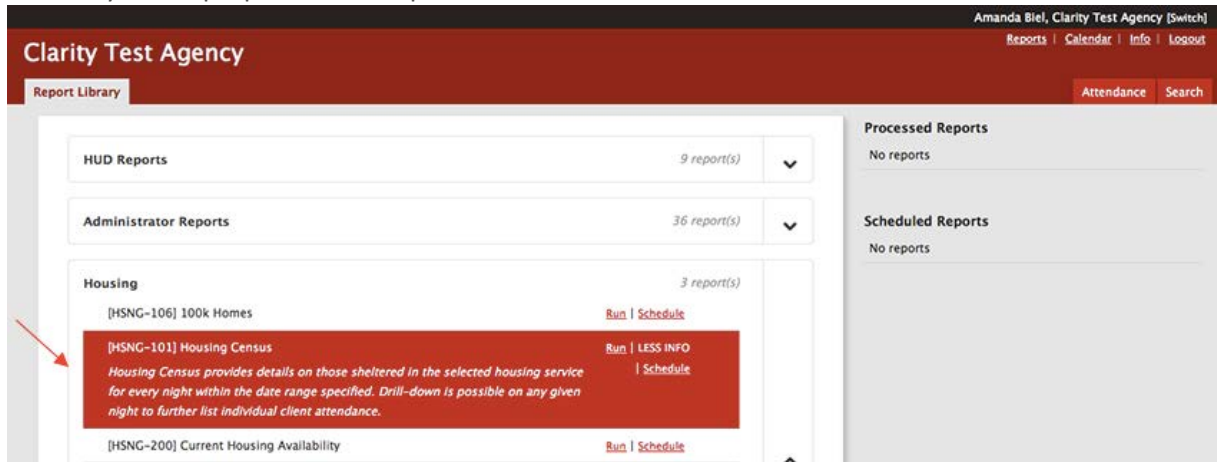
This will take you to the Preview page. Here you can select the parameters for each report. Because each report is different, some of the parameter options will vary depending on the report. In the example below ([OUTS-105] Client Demographics report), the required parameters are:

- 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.
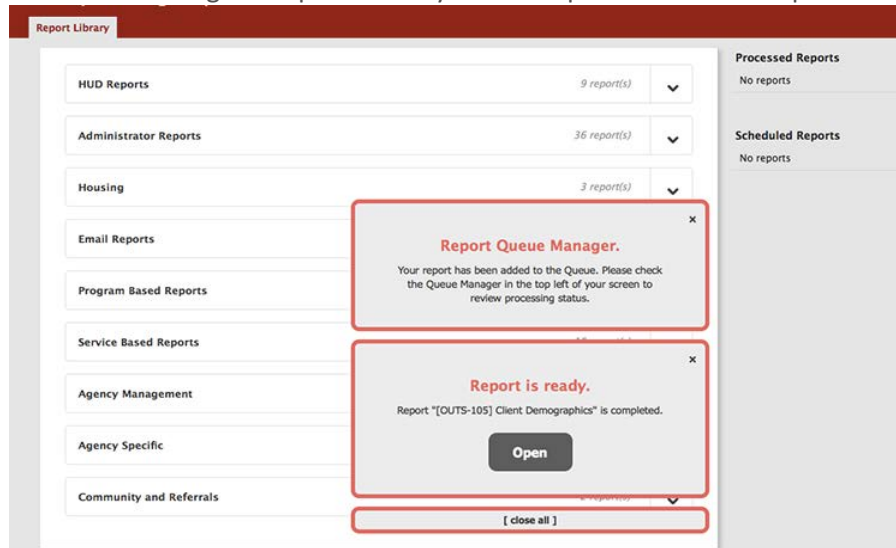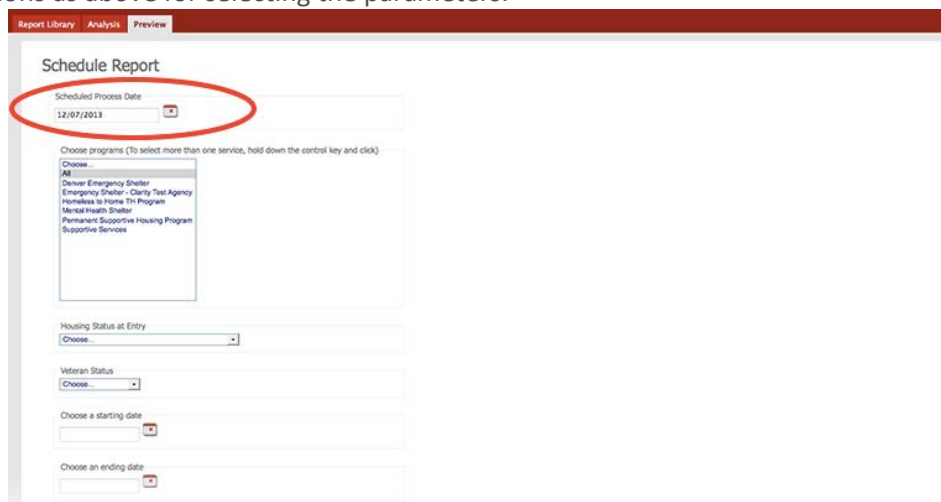

Scheduling a Report

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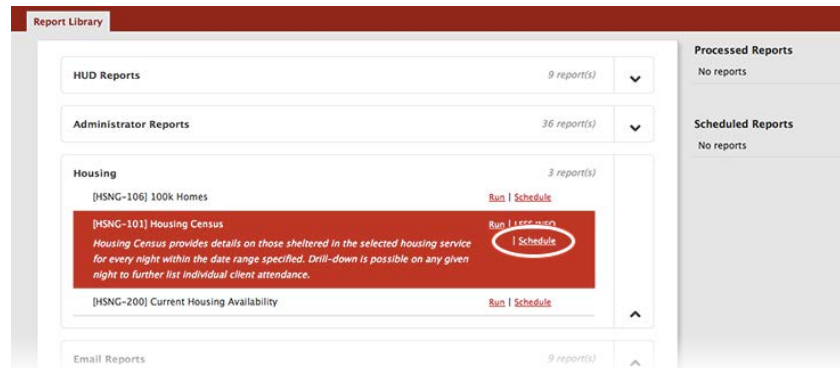
This will take you to the Preview page where you can select the process date for the report. Use the same directions as above for selecting the parameters.

Blank Page