



# Alameda County

Clarity HMIS – General Refresher Training

April 2024



# Agenda



Introductions



Client Profiles and Household Management



Client Contact and Location information



Enrollment and Exits



Reports



# Creating New Client Profiles

Searching for,  
creating new &  
connecting  
profiles



# Creating New Profiles - Searching for Clients in Clarity

--->Search by:

--->Search by name, partial name, DOB, or SSN

--->Create

--->If unable to find, create a new profile



SEARCH FOR A CLIENT

ADD CLIENT +

Search by name, partial name, DOB or SSN

SEARCH

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

Managed with Clarity Human Services

Recover deleted data

# Creating New Profiles

Please make sure to collect as much information as possible, and avoid using "Client Refused" or Data Not Collected" whenever possible

For existing profiles, confirm that all information is correct and up to date

CREATE A NEW CLIENT

Social Security Number		
Quality of SSN	Select	▼
Last Name		🗒
First Name		
Quality of Name	Select	▼
Quality of DOB	Select	▼
Date of Birth	__/__/____	
Middle Name	None	▼
Gender	Select	▼
Race	Select	▼
Ethnicity	Select	▼

Please fill in Release of Information form [CANCEL](#)



# Client Consent

## Informed Consent:

- Client should understand what they are consenting to.
- Consent form (ROI) should be available for the client to review and take

## Consent Duration:

- Clients only need to consent once which is good for 10 years after the last HMIS activity.



## Adding an ROI to a New Client Record:

- The information box to the right must be completed

## Consent Documentation

- Electronic Signature: E-Sign Document button will display
- Attached PDF: Select File button will display to upload file
- Signed Paper Document: Enter your location in the Location text box
- Verbal Consent: Select if the client verbally gave consent

## RELEASE OF INFORMATION

Permission	Yes	▼
Start Date	02/24/2022	 25
End Date	02/24/2025	 25
Documentation	<div><input checked="" type="checkbox"/> Select</div> <ul style="list-style-type: none"><li>Electronic Signature</li><li>Attached PDF</li><li>Signed Paper Document</li><li>Verbal Consent</li></ul>	

# Managing Consent with Existing Client Records

Select the Shield icon on the client's profile

The client's privacy page will display previous records

Select the Edit icon beside the record to update or the Add icon to create a new record

The screenshot displays a client profile interface. On the left is a silhouette of a person. On the right, there are three sections: 'Household Members' with a 'Manage' button, 'Care Team' with a '0' indicator and a 'Manage' button, and a 'RELEASE OF INFORMATION' section. The 'RELEASE OF INFORMATION' section includes a table with one record and an 'ADD RELEASE OF INFORMATION' button with a plus icon.

Permission	Type	Start Date	End Date	Version
Yes System OR-507	Verbal Consent	05/11/2020	12/05/2020	V.3

# Connecting Clients to Create a Household

The screenshot shows the 'Forest Ranger' client profile page. The top navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The user 'Stacy Holmes' is logged in. The 'CLIENT PROFILE' section on the left contains fields for Social Security Number, Quality of SSN, Last Name, First Name, Quality of Name, Quality of DOB, and Date of Birth. The 'Household Members' section in the right sidebar is highlighted, showing 'Ranger Spouse' and 'Significant Other' with a 'Manage' button. Below it are 'Active Programs' (Emergency Shelter (E/E)) and 'Care Team' (with a 'Manage' button). A 'UNIQUE IDENTIFIER 63924C385' is displayed below the client's silhouette.

The Household Members section will be listed at the top of the right sidebar.

Select "Manage" to the right of the section Household Members

You will be taken to Household Management search screen.



# You can add new household members in two ways:

1

Quick Add: Within the right sidebar, your 10 most recently searched client records will appear. Generally, Household members are added to the system sequentially, therefore they will likely be listed here

Household Members	
Bitfocus Test	Not Set *
Test One	Not Set
Bitfocus Baby	Not Set

**Your recent client searches accessed**

Client Tester	1651	
---------------	------	--

2

Search the Search Bar: If the Household members are not listed in the recent search section, you can search for them in the search bar.

HOUSEHOLD MANAGEMENT

**Search for a Household Member**

the lighthouse SEARCH

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

Client	Date of Birth	Last Four SSN	Last Updated
dd The Lighthouse	08/25/1965	2222	02/19/2021

Household History

# Managing Households

Selecting the plus or join icon

Set Member Type and Start Date

### HOUSEHOLD MANAGEMENT

Search for a Household Member

ace ventura SEARCH

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

Client	Date of Birth	Last Four SSN	Last Updated
<span>+ Add</span> Ace Ventura	01/01/1970	3174	09/01/2021

### ADD TO HOUSEHOLD

**Member Type** Stepson ▼

**Start Date** 09/15/2021 📅 25

SAVE

# Editing a Household



Select the edit icon under Household Members



Update information or toggle on exit

## Household Members

Johnny Rose	Husband ★
Ace Ventura	Stepson
Baby Rose	Grandchild



### EDIT GLOBAL HOUSEHOLD



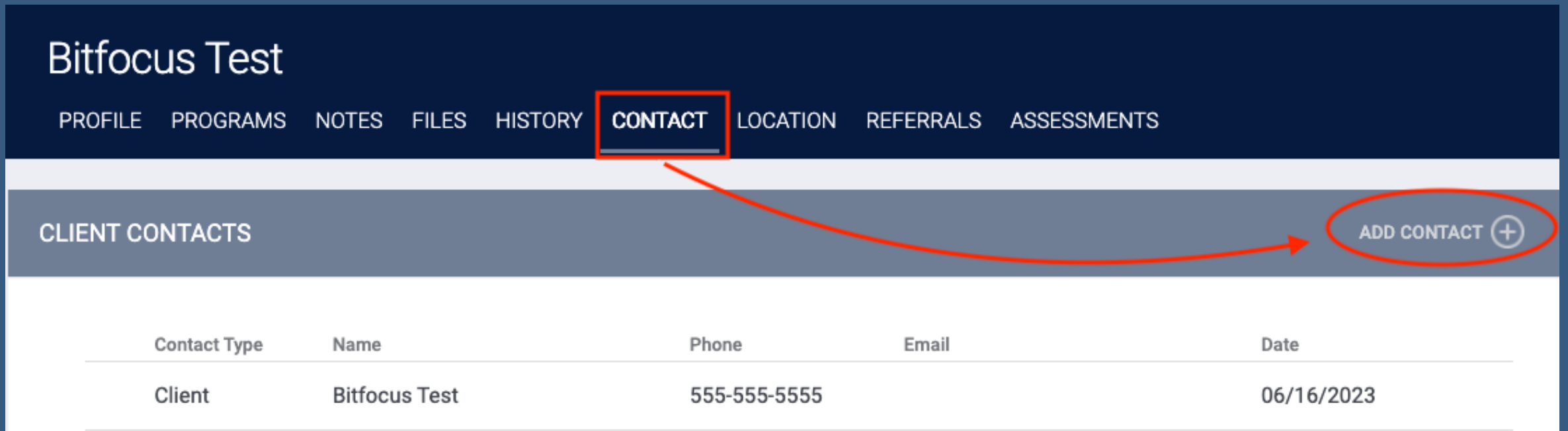
Member Type	Stepson	▼
Head of Household	Johnny Rose	▼
Joined Household	09/15/2021	
Exited Household	<input checked="" type="checkbox"/>	
	09/16/2021	

SAVE

# Entering Client Contact and Location Information

# Creating Contact Records

To create a contact record, click the CONTACT tab within the client record and click ADD CONTACT.



The screenshot displays the Bitfocus Test client record interface. At the top, a navigation bar includes tabs for PROFILE, PROGRAMS, NOTES, FILES, HISTORY, CONTACT, LOCATION, REFERRALS, and ASSESSMENTS. The CONTACT tab is highlighted with a red box. Below the navigation bar, the CLIENT CONTACTS section is visible, featuring a table with columns for Contact Type, Name, Phone, Email, and Date. A red arrow points from the CONTACT tab to the ADD CONTACT (+) button, which is circled in red.

Contact Type	Name	Phone	Email	Date
Client	Bitfocus Test	555-555-5555		06/16/2023

# Creating Contact Records

Select an appropriate Contact Type and enter an email address, phone number, or both, for the contact.

You can turn off the Active Contact toggle if the contact is no longer accurate.

Select a Date to associate with the contact and, if applicable, add a Note.

## ADD CONTACT



Contact Type

Family Members

Name

Email

To view and/or edit a record, hover over it from the CONTACT tab and click the edit icon.

	Contact Type	Name	Phone	Email	Date	
	Family Members	John Smith	555-555-5555	john@mail.com	05/07/2020	



# Location Tab Overview

Location refers to client's geographic location information

You can access the *Location* tab by clicking *LOCATION* in the client record.

Historical location information is stored here as well

**Jane Doe**

PROFILE HISTORY PROGRAMS SERVICES **LOCATION**

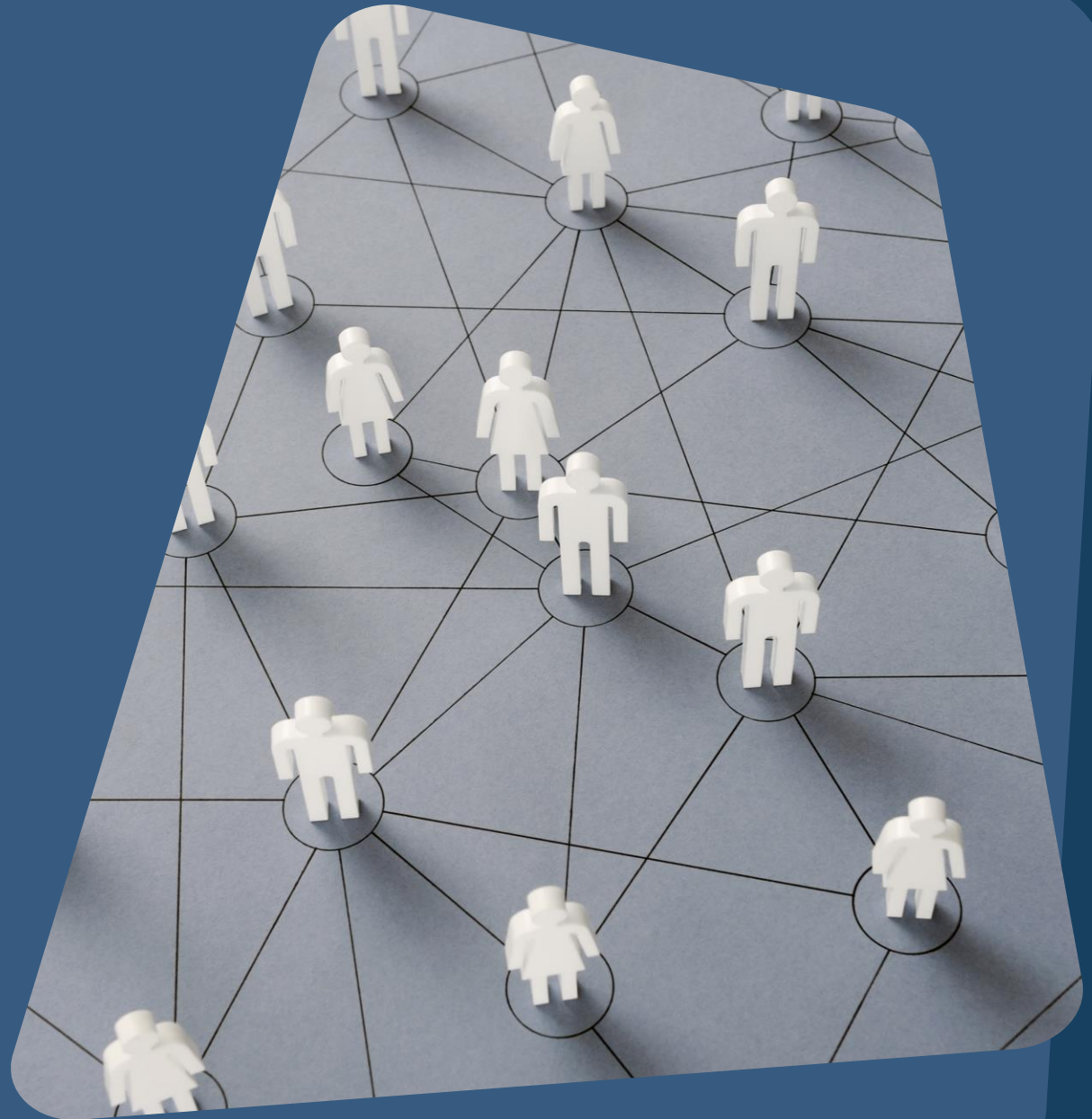
CLIENT PROFILE

CLIENT LOCATION

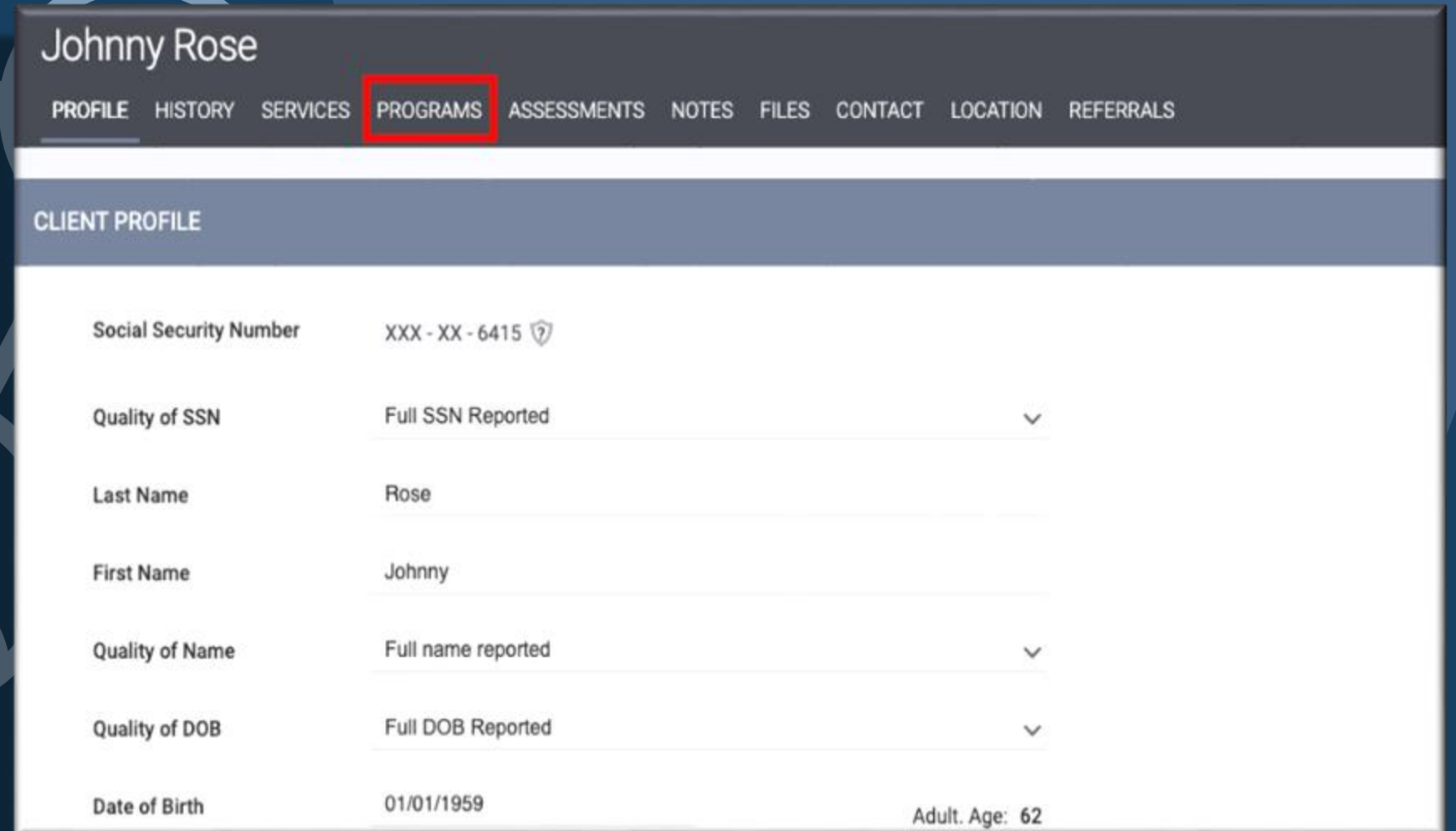
Map showing Los Angeles area with location pins A, B, C, D, E, F.

Type	Select	Status	Active	SEARCH		
Address		Last Updated	Staff	Type	Location Date	Outreach
A	1929 Arlington Ave, Los Angeles, CA, 90018	Knowledge and Training Engineer		Field Interaction	09/23/2020	
E	S San Pedro St, Los Angeles, CA, 90012	Kadra Adderly		Service Geolocation	07/03/2020	
C	1224 N Crescent Heights Blvd, Los Angeles, CA, 90046	Admin Admin		Address: Home	03/10/2020	
D	1036 S Bonnie Brae St, Los Angeles, CA, 90006	Admin Admin		Address: Home	03/10/2020	

# Enrollment Clients Into Programs







Once the client profile is located and any contact info updated, you will click on Programs to enroll the client into your program



**Johnny Rose**

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

CLIENT PROFILE

Social Security Number	XXX - XX - 6415 
Quality of SSN	Full SSN Reported 
Last Name	Rose
First Name	Johnny
Quality of Name	Full name reported 
Quality of DOB	Full DOB Reported 
Date of Birth	01/01/1959 <span style="float: right;">Adult. Age: 62</span>

## Alameda Awesome Program

### Program Description:

This is a special project for such and such

### Occupancy (Today)



- 0 % Checked In
- 0 % Reserved
- 100 % Available



#### Funding Source

HUD: CoC - Transitional Housing

#### Availability

Limited Availability

#### Service Categories:

- ✓ Housing
- ✓ Case Management
- ✓ RHY Service

When you select the program, you will see:

- Enrollments
- Vacancy
- Referrals

### PROGRAM AVAILABILITY:

▶ Available openings

0

### HOUSING AVAILABILITY:

▶ Households without children

10 Beds in 1 Unit

1 pending referral(s). Oldest 581 days.

Program Placement a result of Referral provided by Beez Kneez

Include group members:

Nugget Harris

Pending referrals will be "complete" once enrolled, if applicable.

Toggle on household members, if applicable.

# Recording Assessments



# Current Living Situation

Required for the following:

Coordinated Entry Programs

Night-by-Night Shelters

Street Outreach Programs

Services Only Programs

YHDP Programs



Accurately capture clients current living situation experiencing homelessness.



Document Homeless Chronicity



Capture Imminent Risk of Homelessness



Understand how many times a person is engaged while experiencing homelessness



# Annual Assessment

Required for enrollments open for 365+ days




To get to the Annual Assessment, you must navigate to their active program



Click Add next to Status Assessments and then select the client(s) for which you want to conduct the annual assessment



You can also add an Annual Assessment from the Program Assessments tab.

Status Assessments  Add

Assessment Due - April 1st 2024

No Statuses

ADD PROGRAM ASSESSMENT 

Bitfocus Test

Mother

ADD STATUS ASSESSMENT

ADD ANNUAL ASSESSMENT



# Exiting a Client

# Why is exit destination data important?



Determines the effectiveness of your program and gaps in service



Directly impacts the goals of the HMIS



Document episodes of homelessness that can support clients through the coordinated entry process

# Exiting clients from a program

Identify where the client will be staying after being exited from your program (that night).



Enrollment data will auto-populate to the exit screen except the Exit Destination



The clients' Exit Destination must be entered at the time they are being exited from the program.



Data Not Collected, No Exit Interview Completed, and Other are considered "missing data" – avoid using when possible

Project Exit Date	09/07/2021	
Destination	Staying or living with friends, temporary tenure (e.g. room, apartment or ho	
DISABLING CONDITIONS AND BARRIERS		
Physical Disability	No	▼
Developmental Disability	No	▼
Chronic Health Condition	Yes	▼ Long Term Yes
HIV - AIDS	No	▼
Mental Health Problem	No	▼
Substance Abuse Problem	No	▼
MONTHLY INCOME AND SOURCES		
Income from Any Source	Yes	▼
Earned Income	<input type="checkbox"/>	
Unemployment Insurance	<input type="checkbox"/>	

# Running Reports and Measuring Outcomes



## Key Reports



[GNRL-106] Program Roster



[HUDX-227] Annual Performance Report [FY 2024]



[HUDX-225] HMIS Data Quality Report [FY 2024]



[DQXX-102] Program Data Review



# [GNRL – 106] Program roster report

This program-based report lists program stay information for selected programs and status according to specified report dates.

Demo Agency
REPORT LIBRARY   EXPLORE   DATA ANALYSIS

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## Program Roster Report

**Demo Agency**  
Active within 06/01/2019 thru 06/01/2022

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**Housing Move-in:** Undefined = Unknown HoH or adjusted Move-in is Null,  = Non PH Project,   **A:** Assessments,   **S:** Services,   **CN:** Case Notes  
 You can find more information about adjusted Move-In Date at the [Help Center Article](#)

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff
<i>Program: Zion Housing</i>												
Mouse, Malia	33347CB86	01/02/2018	1	4	02/01/2019	-	1,217	undefined	0	0	0	S. Jones*
Mouse, Minnie	471CA3370	01/25/1985	33	37	11/11/2018	-	1,299	11/11/2018	0	1	0	S. Jones*
Tree, Pine	61F0D4B00	06/04/2011	9	11	06/25/2020	-	707	undefined	0	0	0	S. Hoffman
Tree - do Not Use, Evergreen	76764A8E7	07/01/1988	32	34	10/26/2020	-	584	10/26/2020	0	0	0	S. Hoffman
West Coast, Ginny	0276CF56B	04/09/2002	18	20	10/30/2020	-	580	11/15/2020	0	0	0	A. Banas*
General, George	16764155B	04/26/1955	65	67	02/19/2021	04/15/2021	55	02/19/2021	0	0	0	S. Hoffman
Doe, Danny	F1D1FDADE	04/29/2000	20	22	02/19/2021	03/19/2021	28	02/19/2021	0	0	0	S. Hoffman

**Number of Enrollments: 7**

**Number of Unique Clients: 7**

**Number of Households: 6**

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**Total Number of Enrollments: 7**

**Total Number of Unique Clients: 7**

**Total Number of Households: 6**

# [HUDX– 227] Annual Performance Report [FY 2024]

Recipients of HUD Continuum of Care (CoC) funding (e.g., Supportive Housing Program, Shelter Plus Care, Section 8 Moderate Rehabilitation Single Room Occupancy Program, CoC Program) are required to submit an Annual Performance Report (APR) electronically to HUD every operating year.

HUD Annual Performance Report [FY 2022]		Date Range: 07/01/2021 thru 06/30/2022 Agency cat. filter: Agency CoC Client Location filter: No Funding Criteria: Not Based on Funding Source		
As of 10/1/2017, HUD CoC grantees are now required to submit APR through the Sage HMIS Reporting Repository. You can find instructions for generating the report and submitting to Sage at the <a href="#">Clarity Help Center</a> .				
<b>Q4a. Project Identifiers in HMIS</b>				
Organization Name	Organization ID	Project Name	Project ID	HMIS Project Type
Demo Agency	81	Zion Housing	219	3
<b>Q5a. Report Validations Table</b>				
Program Applicability: All Projects				
Total number of persons served	8			
Number of adults (age 18 or over)	5			
Number of children (under age 18)	3			
Number of persons with unknown age	0			
Number of leavers	0			
Number of adult leavers	0			
Number of adult and head of household leavers	0			
Number of stayers	8			
Number of adult stayers	5			
Number of veterans	1			
Number of chronically homeless persons	5			
Number of youth under age 25	1			
Number of parenting youth under age 25 with children	0			
Number of adult heads of household	4			
Number of child and unknown-age heads of household	1			
Heads of households and adult stayers in the project 365 days or more	4			

# [HUD -225] HMIS Data Quality Report [FY 2024]

The [HUDX-225] HMIS Data Quality Report is a HUD report that reviews data quality across several HMIS data elements.

## HMIS Data Quality Report [FY 2022]

### Demo Agency

CoC Category Filter: Agency CoC  
Date Range: 07/01/2021 thru 06/30/2022

#### Q1. Report Validation Table

Program Applicability: All Projects

Total number of persons served	8
Number of adults (age 18 or over)	5
Number of children (under age 18)	3
Number of persons with unknown age	0
Number of leavers	0
Number of adult leavers	0
Number of adult and head of household leavers	0
Number of stayers	8
Number of adult stayers	5
Number of veterans	1
Number of chronically homeless persons	5
Number of youth under age 25	1
Number of parenting youth under age 25 with children	0
Number of adult heads of household	4
Number of child and unknown-age heads of household	1
Heads of households and adult stayers in the project 365 days or more	4

# [DQXX – 102] Program Data Review

This program enrollment-based report utilizes information from both the enrollment screen and, if applicable, the exit screen.

<b>Program Data Review</b>		<b>Demo Agency</b> Program: Zion Housing Program Type: PH - Permanent Supportive Housing (disability required for entry) Status: Active				
Name	Unique Identifier	Entry Date	Exit Date	Days active in program	Missing Entry Data	Missing Exit Data
Mouse, Malia	33347CB86	02/01/2019	-	1,286	5	-
Mouse, Minnie	471CA3370	11/11/2018	-	1,368	0	-
Tree, Pine	61F0D4B00	06/25/2020	-	776	0	-
Tree - do Not Use, Evergreen	76764A8E7	10/26/2020	-	653	0	-
West Coast, Ginny	0276CF56B	10/30/2020	-	649	3	-
Beetlejuice, Jillian	3CD94B5F3	06/14/2022	-	57	0	-
Beetlejuice Jr., Juju	38F35532C	06/14/2022	-	57	0	-
Beetlejuice, Juju	A6DCE7B9F	06/14/2022	-	57	0	-

# QUESTIONS?



# Additional Resources

Alameda County HMIS Website: [alameda.bitfocus.com](http://alameda.bitfocus.com)

Alameda County HMIS Technical Support:

- Email: [hmissupport@achmis.org](mailto:hmissupport@achmis.org)

Bitfocus

For support with:

- New User Requests
- Password Reset
- Login Issues
  - Email: [Alameda@bitfocus.com](mailto:Alameda@bitfocus.com)
  - Phone: (408) 429-5046

Events:

- Alameda County HMIS Q&A Session | [Register HERE](#)
- Alameda County Coordinated Entry Q&A Session | [Register HERE](#)
- Alameda County User and Liaisons Meeting | [Register HERE](#)