



Homeless Management Information System

Santa Cruz County Continuum of Care

Clarity HMIS workflow
Annual Assessment



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Annual Assessment

Annual Assessment must be created for each clients who are enrolled in a project one year or more, even if there is no change in the client's status. 'Project Status Date' must be no more than 30 days before or after the anniversary of the head of household's *Program Start Date* (red arrow). If the household members have different start dates, the annual assessment are based solely on the head of household's anniversary date. All members in the enrollment must be updated at the same time. You must do this annually if the client is still enrolled. Users will see **Assessment Due** with a date in red text, this will be an indication for users to enter a client's Annual Assessment (blue arrow).

The screenshot displays the Scooby Doo software interface. At the top, the user is logged in as 'Staff One, Encompass' with a notification badge showing '15'. The navigation bar includes 'PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES LOCATION', a search function, and 'CASELOAD'. A green banner at the top left states 'Your changes have been saved successfully.' The main content area is titled 'PROGRAM: HOUSING FOR HEALTH (S)' and has tabs for 'Enrollment', 'History', 'Provide Services', 'Assessments', 'Notes', and 'Files'. The 'History' tab is active, showing 'Program Service History' with a 'LINK FROM HISTORY' button. Below this, it says 'There are no results to display'. On the right side, a summary card shows '367 DAYS ACTIVE PROGRAM'. Below this, a table lists program details: 'Program Type: Group (2)', 'Program Start Date: 03/18/2018', 'Assigned Staff: Staff One', and 'Head of Household: Scooby Doo'. A section titled 'Program Group Members' lists 'Scappy Doo' with a start date of '03/18/18' and status 'Active'. Below that, 'Status Assessments' shows 'Assessment Due - March 18th 2019' in red text. At the bottom, it indicates 'Assessment due every year' and 'Notification: ON'. A red arrow points to the 'Program Start Date' and a blue arrow points to the 'Assessment Due' date.

Managed with Clarity Human Services

Accessing Clients with Annual Assessment Due

It is by Clarity's default that whoever enters the client's enrollment will be the case manager for that client. To find clients who need their Annual Assessment conducted, go to **Caseload** corner right (red arrow), then click on **Status Due** (blue arrow) then click on the client you wish to conduct an Annual Assessment. Please note that clients who were enrolled prior to Santa Cruz's Clarity go live date of April 9, 2018 will not appear in the case manager's **Status Due**. Clarity Managers will be able to run a Look to see which clients require an annual assessment ([see page 8](#)).

The screenshot shows the Encompass software interface. The top navigation bar includes the Encompass logo, a search icon, a notification icon with '15', the user name 'Staff One, Encompass', and a profile icon 'SO'. The 'CASELOAD' link is highlighted with a red arrow. The main content area is titled 'STATUS DUE' and features a search bar and a 'SEARCH' button. Below the search bar, there are two tables of clients. The first table is for the 'Program: Encompass - River Street Shelter (ES)' and the second is for 'Program: Housing for Health (S)'. Both tables have columns for Client, Start Date, Last Status Date, Assessment Due, and Household Members.

| Client | Start Date | Last Status Date | Assessment Due | Household Members |
|-----------|------------|------------------|----------------|-------------------|
| Jenny Doe | 03/18/2018 | 03/18/2018 | | 1 |

| Client | Start Date | Last Status Date | Assessment Due | Household Members |
|--------------|------------|------------------|----------------|-------------------|
| ☑ Scooby Doo | 03/18/2018 | 03/18/2018 | | 2 |

Conduct Client's Annual Assessment

After clicking on the client's name, it will direct you to the client's Program Enrollment. Click on Assessment (red arrow), then click on Annual Assessment

The screenshot displays the Scooby Doo software interface. At the top, the user is logged in as 'Staff One, Encompass' with a notification badge showing '15'. The main header shows 'PROGRAM: HOUSING FOR HEALTH (S)'. Below this, there are tabs for 'Enrollment', 'History', 'Provide Services', 'Assessments', 'Notes', and 'Files'. A red arrow points to the 'Assessments' tab. Under the 'Assessments' tab, there are two rows: 'Status Update Assessment' and 'Annual Assessment', each with a 'START' button. A blue arrow points to the 'START' button for the 'Annual Assessment'. To the right, there is a summary card showing '367 DAYS ACTIVE PROGRAM' and details for 'Program Type: Group (2)', 'Program Start Date: 03/18/2018', 'Assigned Staff: Staff One', and 'Head of Household: Scooby Doo'. Below this is a 'Program Group Members' section with one member listed: 'Scabby Doo' with a start date of '03/18/18' and status 'Active'. The 'Status Assessments' section shows 'Assessment Due - March 18th 2019' and 'No statuses'. At the bottom, it says 'Assessment due every year' and 'Notification: ON'.

Program Household Annual Assessment

As mentioned above, all household members in the program must have their Annual Assessment done at the same time. After clicking the **Annual Assessment Start** button, *Add Program Assessment* pop up window will appear. In this window, select the group members by clicking the toggle to blue to include the members for the Annual Assessment then click **Add Annual Assessment** (red arrow).

The screenshot displays the Scooby Doo program interface. At the top, the user is logged in as Staff One, Encompass. The main content area shows the program details for 'HOUSING FOR HEALTH (S)'. A pop-up window titled 'ADD PROGRAM ASSESSMENT' is open, showing two household members: Scooby Doo (Uncle) and Scappy Doo (Nephew). Both have blue toggle switches turned on. A red arrow points to the 'ADD ANNUAL ASSESSMENT' button at the bottom of the pop-up. The background shows the program details, including the program type (Group (2)), start date (03/18/2018), assigned staff (Staff One), and head of household (Scooby Doo). The program group members list shows Scappy Doo as active on 03/18/18. The status assessments section shows 'Assessment Due - March 18th 2019' and 'No statuses'.

Annual Assessment

Enter the Project status Date (**red arrow**) for your client and complete the Annual Assessment for each member, making sure to enter any changes to disability types, income, benefits, or health insurance that occurred since enrolled in the program. This would be a date **30 days** prior to the anniversary of the head of household's program start. Please click **Save** on each client's Annual Assessment.

Scooby Doo

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION

PROGRAM: HOUSING FOR HEALTH (S)

Enrollment History Provide Services **Assessments** Notes Files ✕ Exit

Add Annual Assessment for client Scooby Doo

Project Status Date 03/25/2019  

DISABLING CONDITIONS AND BARRIERS

| | | |
|--------------------------|----|---|
| Disabling Condition | No | ▼ |
| Physical Disability | No | ▼ |
| Developmental Disability | No | ▼ |
| Chronic Health Condition | No | ▼ |
| HIV - AIDS | No | ▼ |

Clarity Manager- Annual Assessment Look Report

Bitfocus has provided each Agency a report to run to help monitor progress towards collecting Annual Assessments. Users with Clarity Manager License are able to access this report- click on the Launcher pad (red arrow), then click on **Reports** (blue arrow). After clicking **Reports** click on **Data Analysis** (green arrow), scroll down to the last row and click on [your agency name] **Reports** (purple arrow).

The screenshot displays the Encompass Clarity Manager interface. The top navigation bar includes the Encompass logo, a menu with options like REPORT LIBRARY, EXPLORE, and DATA ANALYSIS, and a user profile for Staff Two, Encompass. A launcher pad icon is highlighted with a red arrow. A dropdown menu is open, showing options for MANAGE, REPORTS (highlighted with a blue arrow), CALENDAR, and ATTENDANCE. The main content area shows a list of report categories under the heading DATA ANALYSIS:

| Report Category | Report Count |
|------------------------------------|--------------|
| Built In Reports | 0 report(s) |
| Santa Cruz Training System Reports | 0 report(s) |
| Encompass Reports | 1 report(s) |

The 'Encompass Reports' row is highlighted with a purple arrow, indicating the final step in the navigation process.

Clarity Manager- Annual Assessment Look Report-Continued

The dropdown will lists all saved Looks, click run for the **Annual Assessment Due** (red arrow). After clicking run, it will take you to your agency's Annual Assessment Due report.

DATA ANALYSIS

Built In Reports 0 report(s) ▼

Santa Cruz Clarity System Reports 0 report(s) ▼

Encompass Reports 6 report(s) ▲

root

| | |
|--|--|
| River St Shelter - Exit Destination Report | ▶ RUN |
| LSA DATA QUALITY (BETA) | ▶ RUN |
| [SPM & LSA] Client Location of Head of Household | ▶ RUN |
| LSA- Warnings Flagged | ▶ RUN |
| Clients w/ Assessments but not in queue | ▶ RUN |
| Annual Assessment Due | ▶ RUN  |

Annual Assessment Due Report

In the report, you will see a list of clients in your agency whose annual assessment status is either: **Past Due, Due in 30-60 days, or Due.**

To view the client's profile or enrollment, click on  (red arrow) then click on either  Clarity Program Enrollment  or  Clarity Profile .

Once a user completes the annual assessment for the client, when you re-run the report, you will no longer see the client in the list. It may take a day to refresh the data, it is advisable to re-run the report the following day if the client is still appearing on the report.

▼ FILTERS (3) Custom Filter

Enrollments **Reporting Period Filter**
Conditionally Required is any time

 DQ Annual Assessments **Annual Assessment Status**

is Past Due ✕

OR is Due in 30-60 d: ✕

OR is Due ✕ +

 Enrollments **Head of Household (Yes / No)**

is Yes ✕

▶ VISUALIZATION

▼ DATA RESULTS Row Limit 5000 Totals

| # | Programs Name | Clients Personal Id | Enrollments Enrollment Id | DQ Annual Assessments Annual Assessment Status | DQ Annual Assessments Targeted Annual Assessment | DQ Annual Assessments Annual Assessment Date |
|---|---------------|--|---|--|--|--|
| 1 | HUD RRH | 5363  | 33219  | Due | 2019-03-21 | 0 |