

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).

Scooby Doo

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION

SEARCH CASELOAD

Your changes have been saved successfully.

PROGRAM: HOUSING FOR HEALTH (S)

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

Program Service History LINK FROM HISTORY

There are no results to display

Managed with Clarity Human Services

367 DAYS ACTIVE PROGRAM

Program Type: Group (2)

Program Start Date: 03/18/2018

Assigned Staff: Staff One ☒

Head of Household: Scooby Doo ☒

Program Group Members

Scappy Doo	03/18/18	Active
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Status Assessments

Assessment Due - March 18th 2019

No statuses

Assessment due every year
Notification: **ON** ☒

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 web application interface. The top navigation bar includes the Encompass logo, a search bar, and a 'CASELOAD' link highlighted with a red arrow. The 'STATUS DUE' link is highlighted with a blue arrow. The main content area displays two tables of clients with annual assessments due.

Program: Encompass - River Street Shelter (ES)

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

Program: Housing for Health (S)

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 header includes the logo, navigation tabs (PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, LOCATION), and user information (Staff One, Encompass). The main content area shows the 'PROGRAM: HOUSING FOR HEALTH (S)' and a sub-tabbed interface with 'Enrollment', 'History', 'Provide Services', 'Assessments' (highlighted with a red arrow), 'Notes', and 'Files'. The 'Assessments' tab contains 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, a sidebar displays '367 DAYS ACTIVE PROGRAM' and a table of program details (Program Type: Group (2), Program Start Date: 03/18/2018, Assigned Staff: Staff One, Head of Household: Scooby Doo). Below this, the 'Program Group Members' section shows 'Scappy Doo' as 'Active' on '03/18/18'. The 'Status Assessments' section indicates 'Assessment Due - March 18th 2019' and 'No statuses'.

Scooby Doo

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION

SEARCH CASELOAD

PROGRAM: HOUSING FOR HEALTH (S)

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

Assessments LINK FROM ASSESSMENTS

Status Update Assessment	START
Annual Assessment	START

Assessment History

There are no results to display

367 DAYS ACTIVE PROGRAM

Program Type:	Group (2)
Program Start Date:	03/18/2018
Assigned Staff:	Staff One <input checked="" type="checkbox"/>
Head of Household:	Scooby Doo <input checked="" type="checkbox"/>

Program Group Members

Scappy Doo	03/18/18	Active
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Status Assessments

Assessment Due - March 18th 2019

No statuses

Assessment due every year
Notification: **ON** ☒

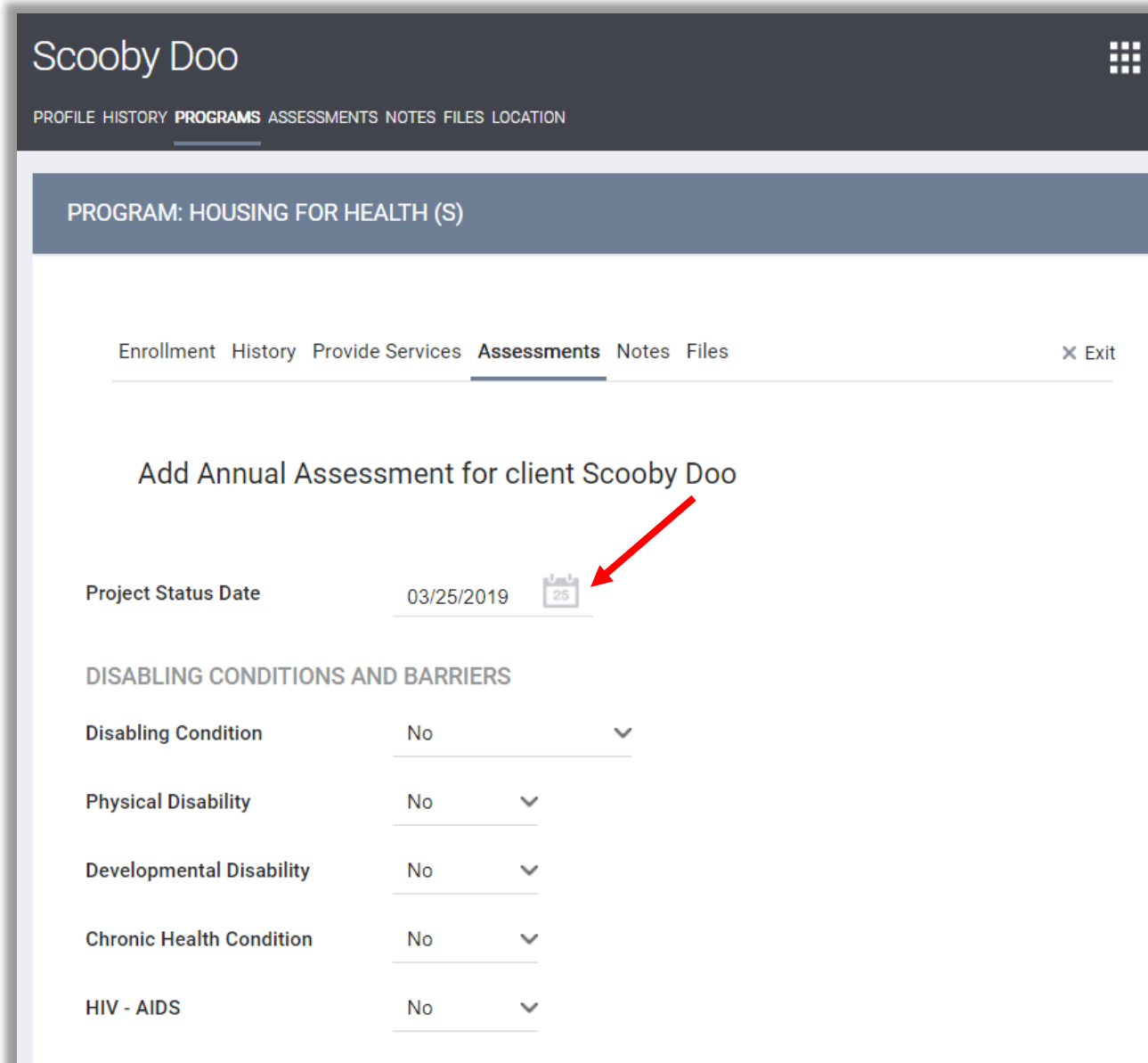
Program Household Annual Assessment

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. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', and 'LOCATION'. The 'PROGRAMS' tab is active, showing 'PROGRAM: HOUSING FOR HEALTH (S)'. A pop-up window titled 'ADD PROGRAM ASSESSMENT' is open, featuring two toggle switches for 'Scooby Doo' (Uncle) and 'Scappy Doo' (Nephew), both of which are turned on. A red arrow points to the 'ADD ANNUAL ASSESSMENT' button at the bottom of the pop-up. The background interface shows a '367 DAYS ACTIVE PROGRAM' status, a table of program details (Program Type: Group (2), Program Start Date: 03/18/2018, Assigned Staff: Staff One, Head of Household: Scooby Doo), and a list of 'Program Group Members' including 'Scappy Doo' (03/18/18, Active). The 'Assessments' section shows 'Status Update Assessment' and 'Annual Assessment' buttons, and the 'Assessment History' section is visible at the bottom.

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 'REPORT', 'LIBRARY', 'EXPLORE', and 'DATA ANALYSIS' (highlighted with a green arrow), a user profile for 'Staff Two, Encompass' with a red 'S2' badge, and a search bar. A red arrow points to the 'Launcher pad' icon (a grid of dots) in the top right. A blue arrow points to the 'REPORTS' option in a dropdown menu that also includes 'MANAGE', 'CALENDAR', and 'ATTENDANCE'. Below the navigation bar, the 'DATA ANALYSIS' section is visible. It contains a table with the following data:

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

A purple arrow points to the '1 report(s) ▼' link in the 'Encompass Reports' row.






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	Ø