Homeless Management Information System

Santa Cruz County Continuum of Care

Clarity HMIS workflow

Annual Assessment

Bitfocus

January 2022

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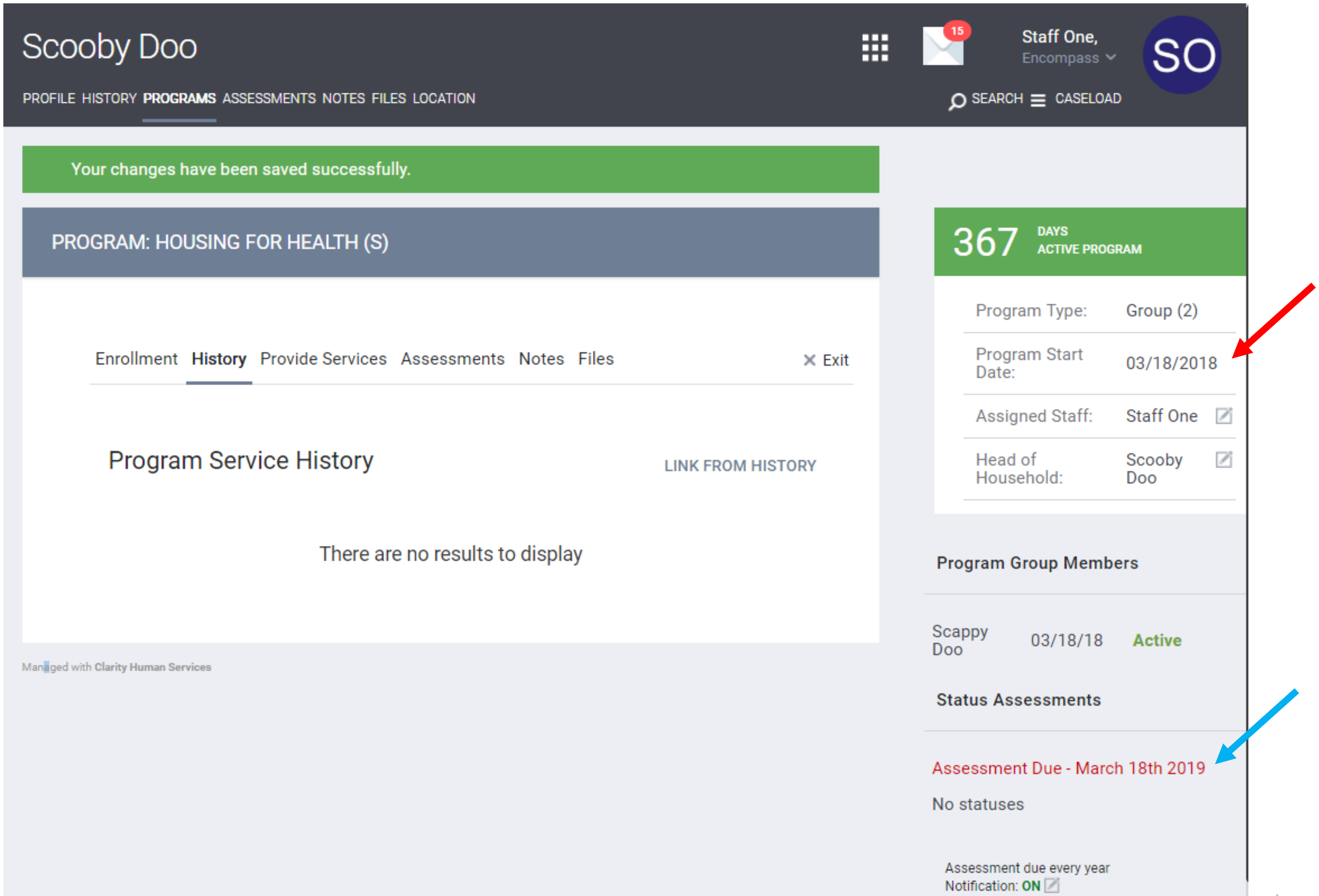
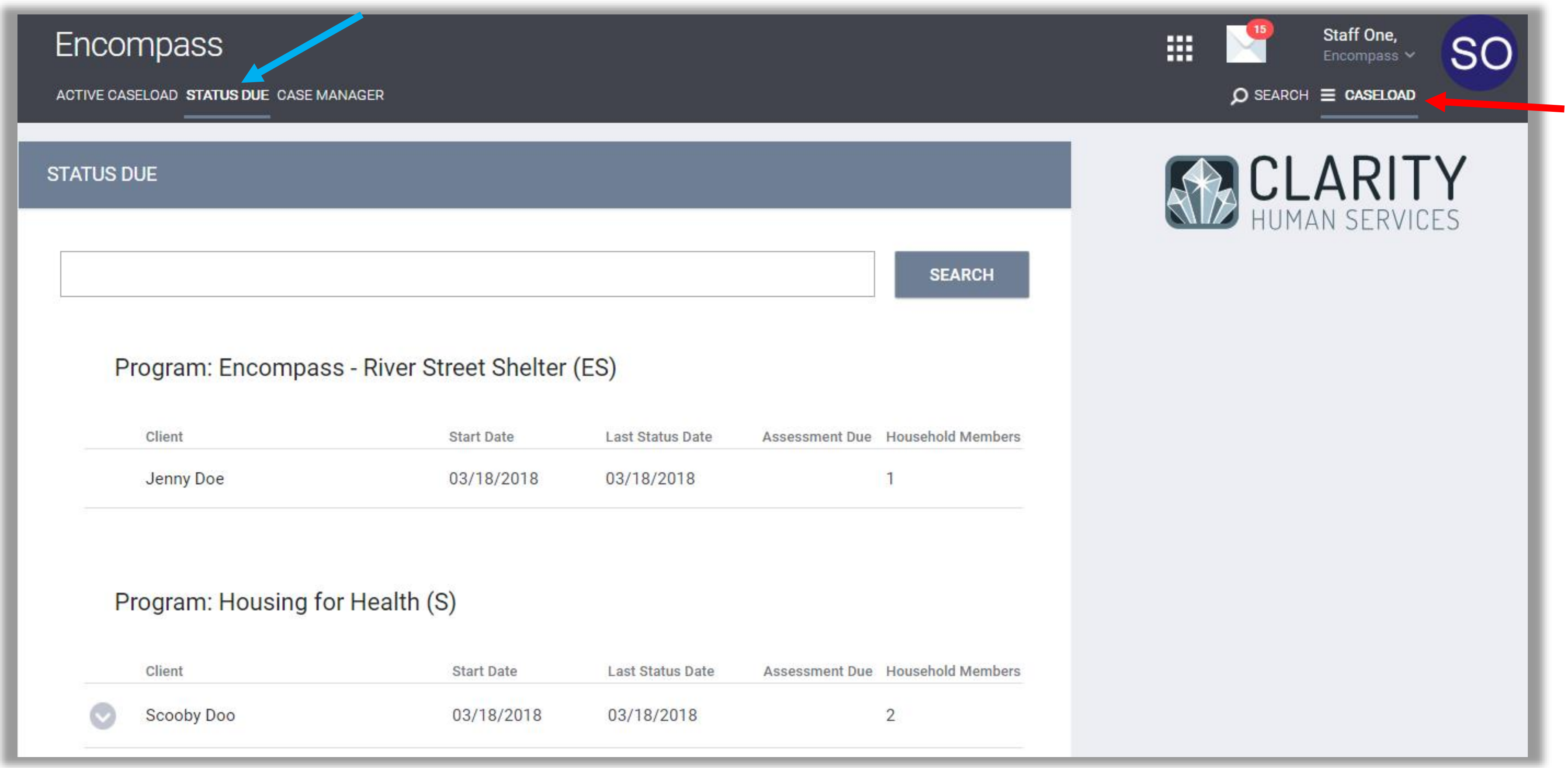
Annual Assessment

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).



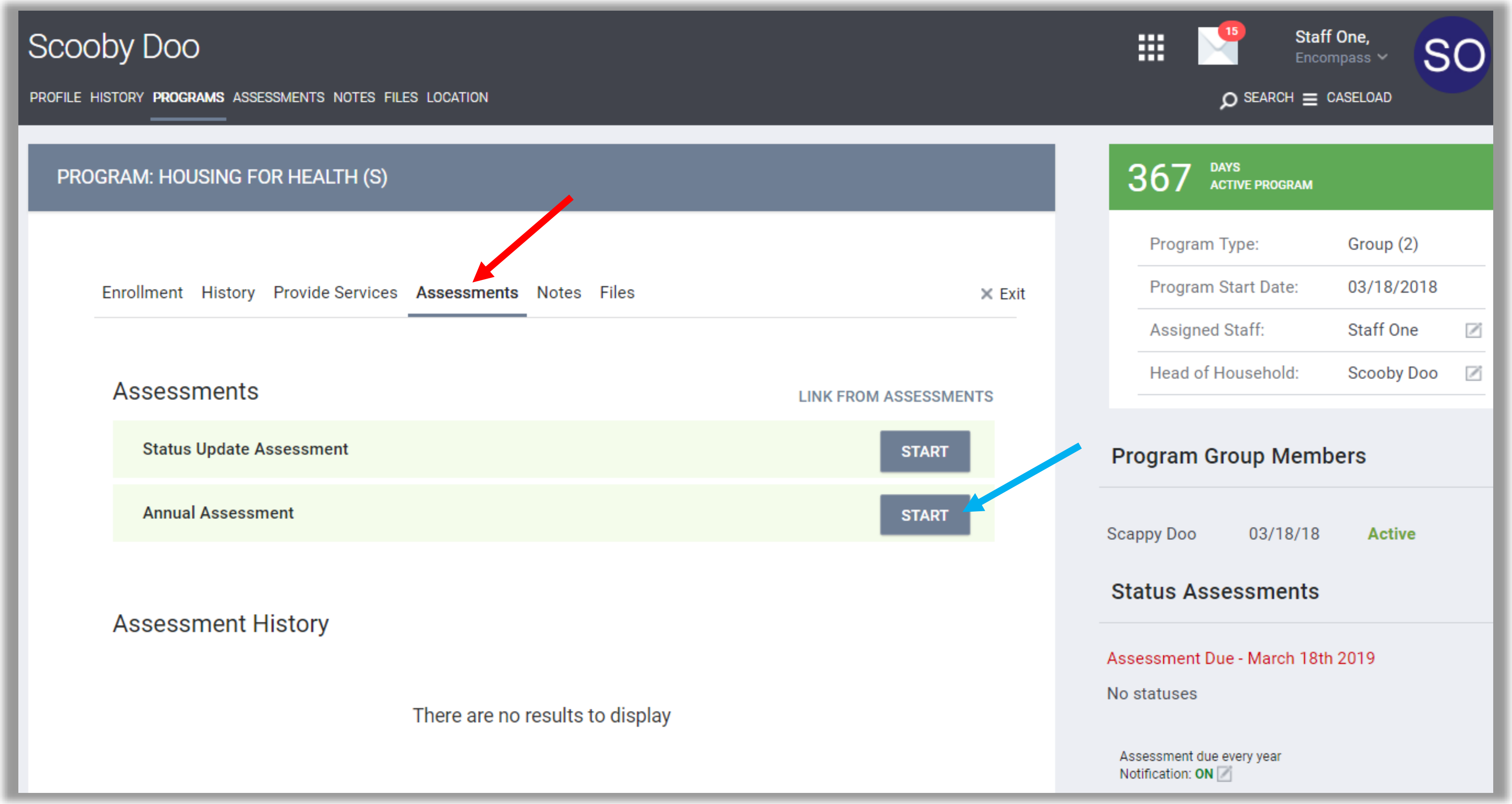
Accessing Clients with Annual Assessment Due

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).



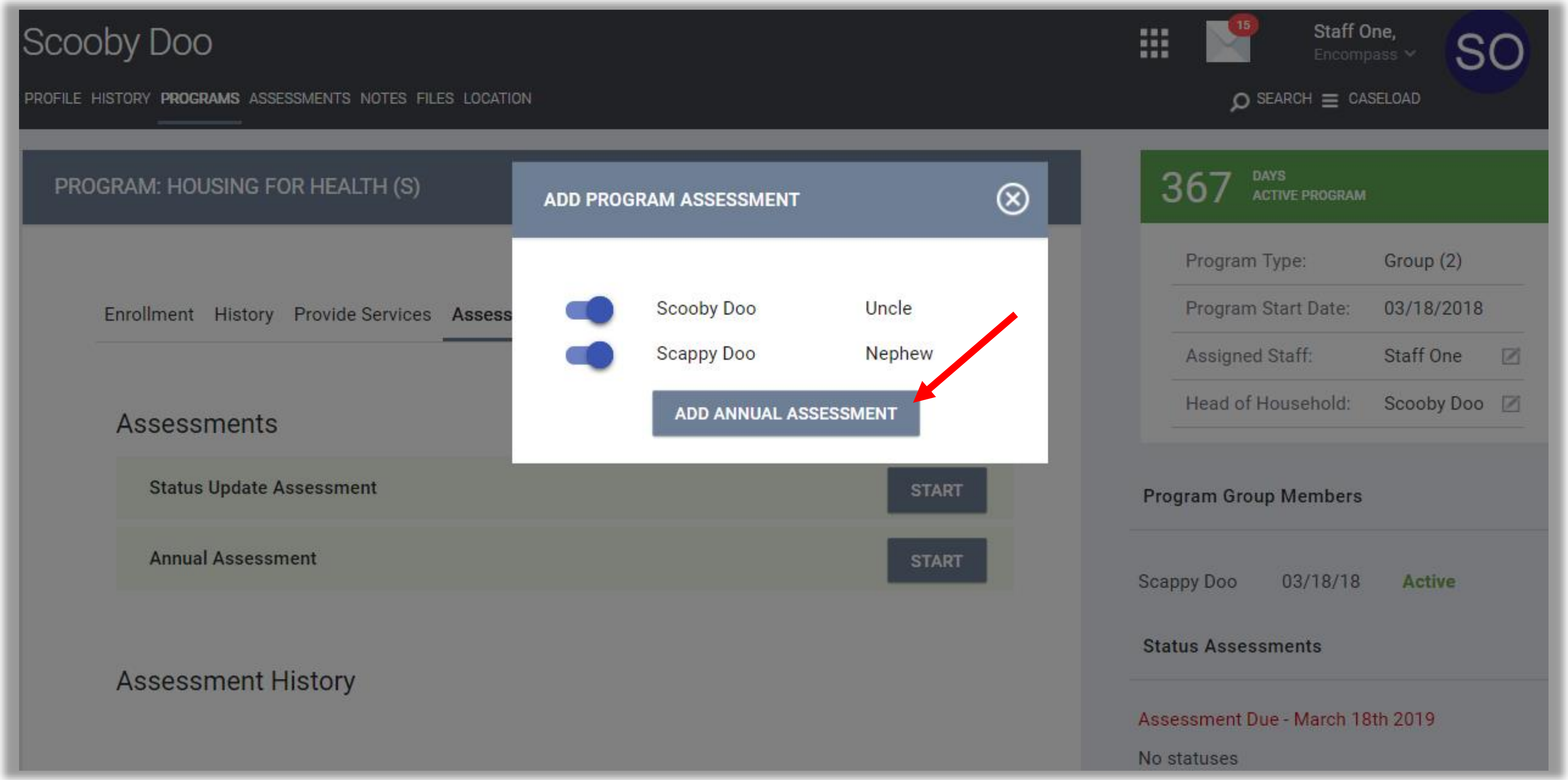
Conduct Client's Annual Assessment

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



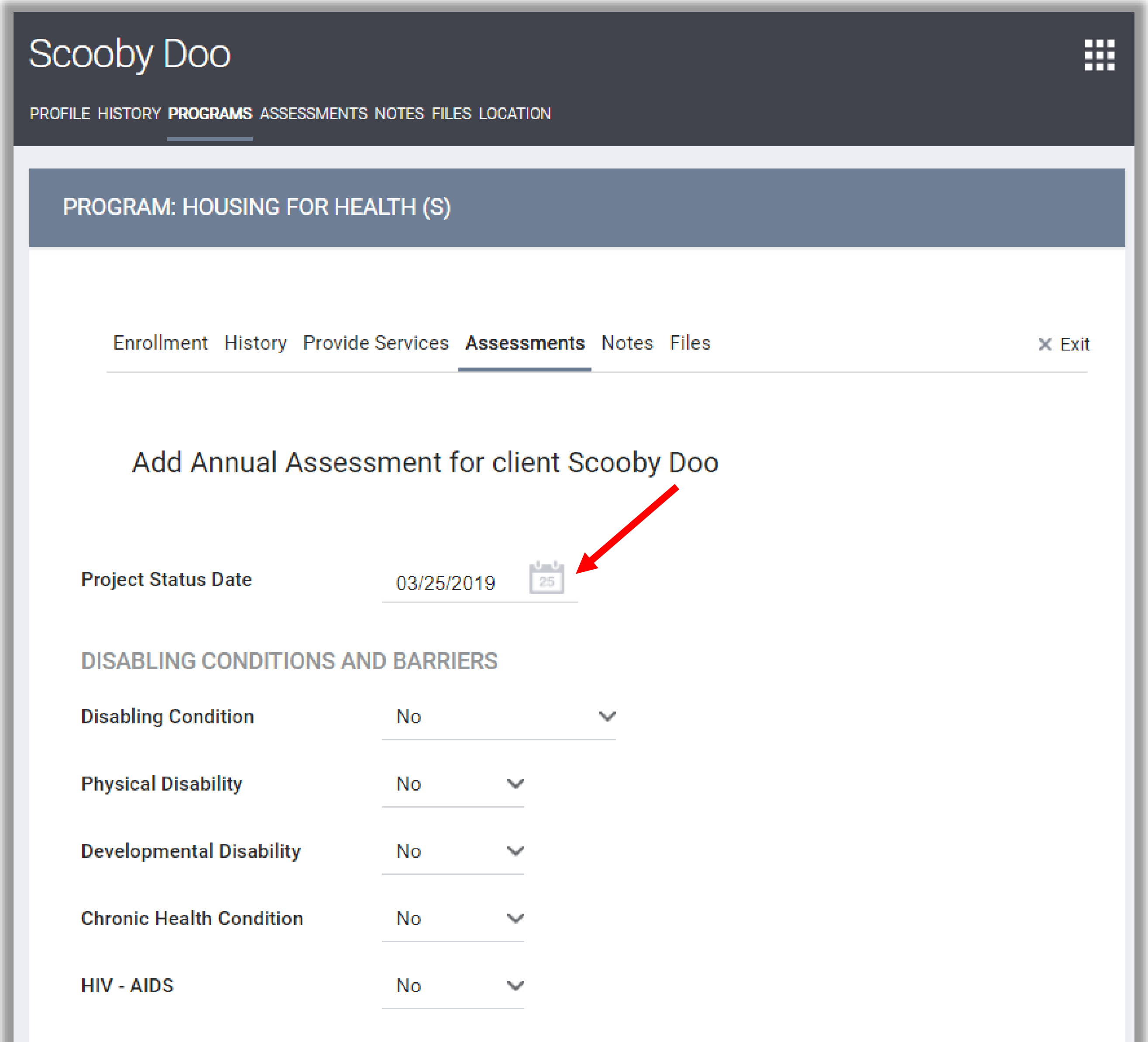
Program Household Annual Assessment

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).



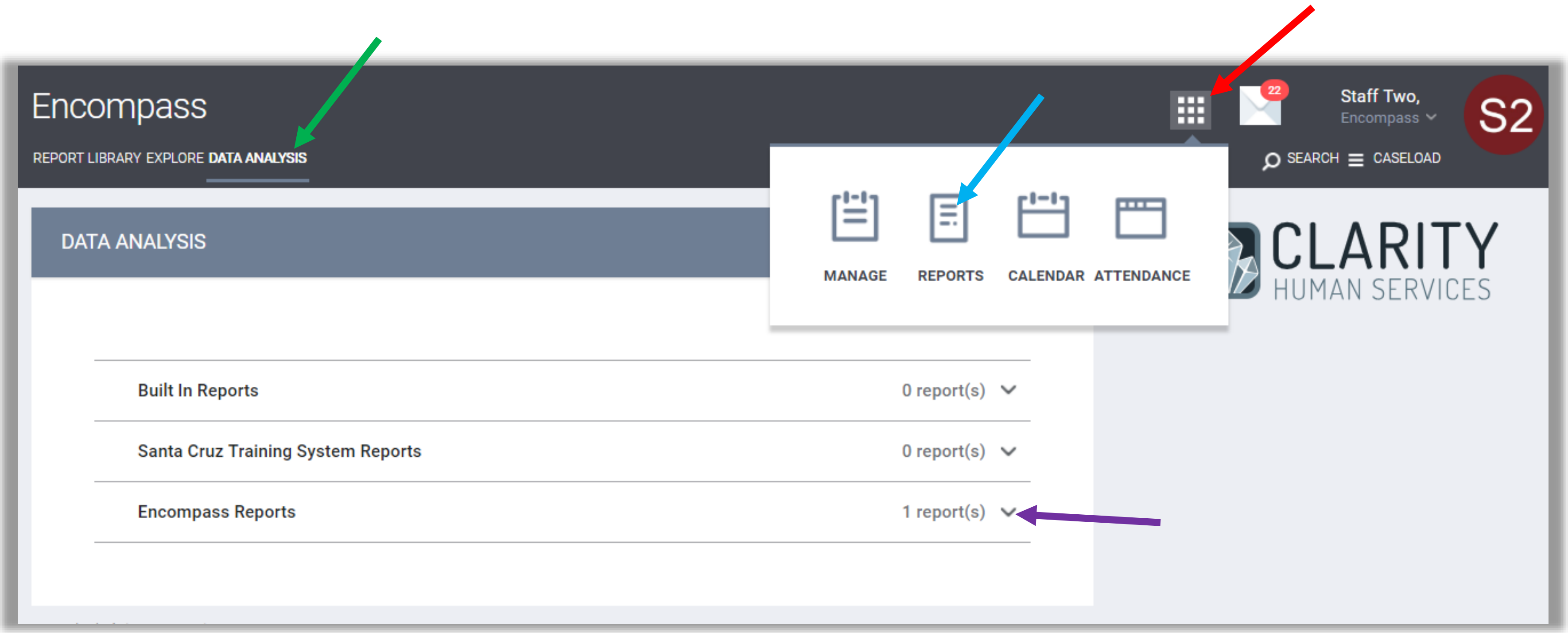
Annual Assessment

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.



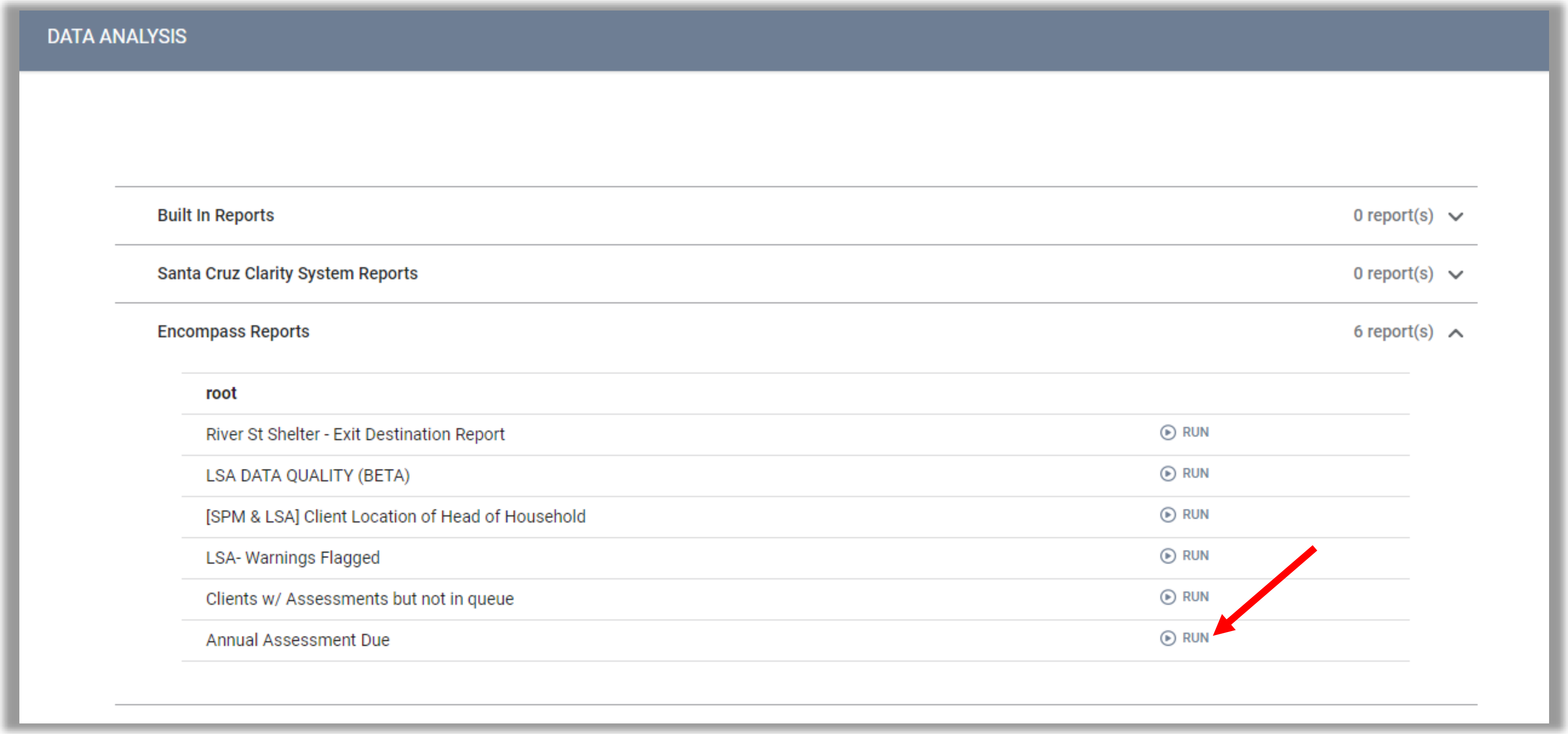
Clarity Manager- Annual Assessment Look Report

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)**.**



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.



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.