



Homeless Management Information System

Santa Cruz County Continuum of Care

2019 v2

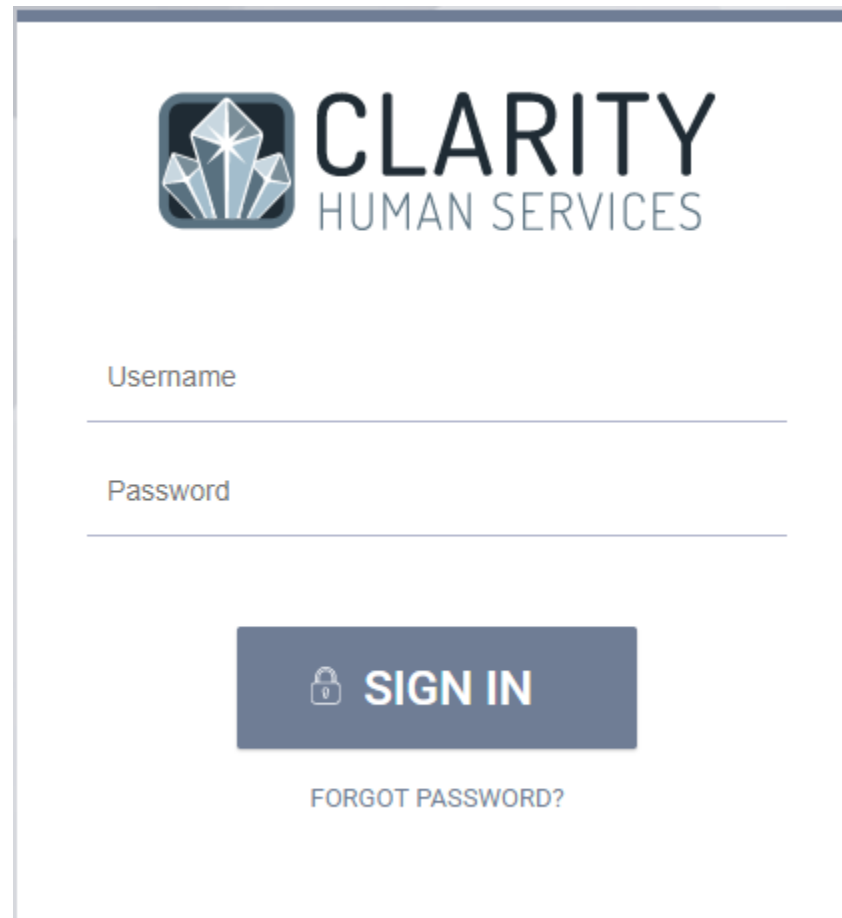
Clarity HMIS workflow Adding New Clients



Access HMIS Web Portal

Access the **Santa Cruz HMIS** portal at: santacruz.clarityhs.com

Enter given Username and temporary Password, then click *Sign In*.
If no temporary password was given, click on *Forgot Password* (see page 4).



The screenshot shows the login interface for Clarity Human Services. At the top, there is a logo consisting of a square icon with three diamonds inside, followed by the text "CLARITY" in a large, bold, sans-serif font, and "HUMAN SERVICES" in a smaller, all-caps, sans-serif font below it. Below the logo, there are two input fields: the first is labeled "Username" and the second is labeled "Password". Both fields are represented by horizontal lines. Below the input fields is a dark blue rectangular button with a white padlock icon and the text "SIGN IN" in white, all-caps, sans-serif font. Below the button, the text "FORGOT PASSWORD?" is displayed in a smaller, all-caps, sans-serif font.

Temporary Password- Password Change

Upon logging in, you will need to set your own password. Set your password then click *Save Changes*.

PASSWORD CHANGE REQUIRED

The password for your account has expired. Please change your password.
Your password should be 8 characters or longer, and be a combination of all four of the following

- * English uppercase characters (A through Z)
- * English lowercase characters (a through z)
- * Numerals (0 through 9)
- * Non-alphabetic characters (such as !,\$,#,%)

Password can't contain username, can't be a take on the word "clarity", can't be the same one as before.

Email	Training1@training.com
Password	<input type="password"/>
Confirm Password	<input type="password"/>

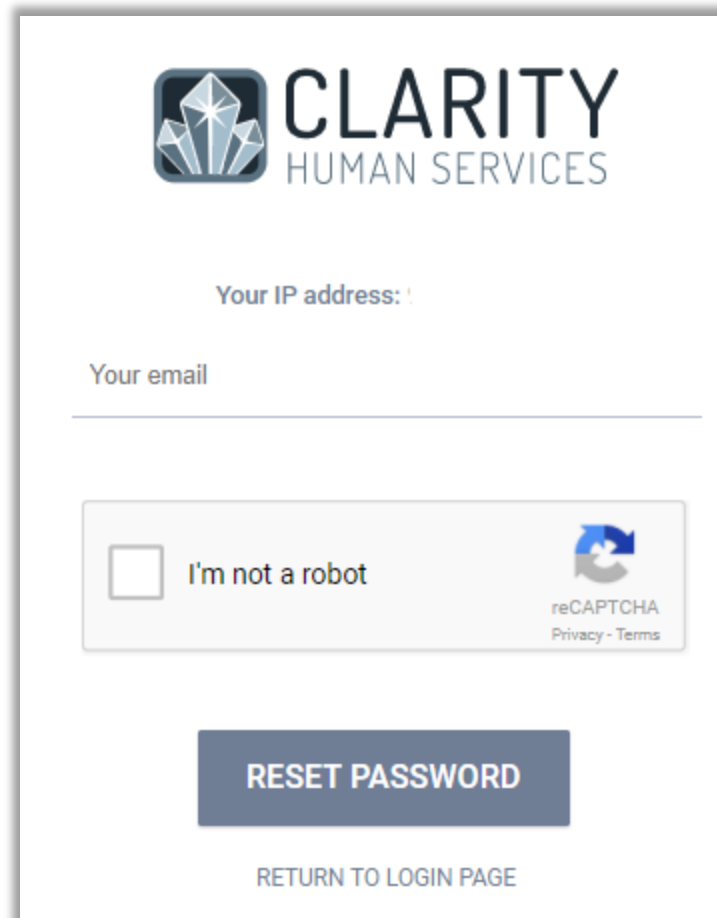
SAVE CHANGES

Forgot Password/Reset Password

If a user forgets their password or need to reset the password:

Enter user's e-mail, click on the check box *I'm not a robot*, then click *Reset Password*.

User will now be notified by email with a link and how to reset the password.



The screenshot shows the Clarity Human Services password reset interface. At the top is the Clarity Human Services logo, which consists of a blue square icon with white geometric shapes and the text "CLARITY HUMAN SERVICES" in a sans-serif font. Below the logo, the text "Your IP address: !" is displayed. A text input field labeled "Your email" is positioned below that. A reCAPTCHA widget is located below the email field, featuring a checkbox labeled "I'm not a robot" and the reCAPTCHA logo with the text "reCAPTCHA Privacy - Terms". At the bottom of the form is a large, dark blue button with the text "RESET PASSWORD" in white. Below the button is a link that says "RETURN TO LOGIN PAGE".

User Policy Agreement- Signature

A *User Policy Agreement* screen appears on the next screen after logging in. Read and check off all the Policy Agreement, then click *Save*.

USER POLICY AGREEMENT

Agency User recognizes the primary focus in the design and management of the Bay Area HMIS is to address the needs of clients. This includes both the need to continually improve the quality of homeless and housing services, and the need to maintain client confidentiality by treating personal data with respect and care.

As the guardians entrusted with this personal data, Bay Area HMIS users have a moral and legal obligation to ensure that appropriate methods are practiced with the collection, access, and utilization of data. Each user is responsible to make sure that client data is only used for the purpose for which it is collected. Proper user training, adherence to the Bay Area HMIS policies and procedures, and a clear understanding of client confidentiality are vital to achieving these goals.

It is a client's decision about which information, if any, entered into HMIS shall be shared and with which Partner Agencies. The client Release of Information (ROI) shall be signed if the client agrees to share information with Partner Agencies.

- My user ID and password are for my use only and must not be shared with anyone.
- I must take all reasonable means to keep my password physically secure.
- I understand that the only individuals who can view information in HMIS are authorized users and the clients to whom the information pertains.
- I may only view, obtain, disclose, or use the database information that is necessary to perform my job
- If I am logged into HMIS and must leave the work area where the computer is located, I must log off HMIS before leaving the work area.
- Failure to log off HMIS may result in a breach in client confidentiality and system security.
- Hard copies of HMIS information must be kept in a secure file.
- When hard copies of HMIS information are no longer needed, they must be properly destroyed to maintain confidentiality.
- If I notice or suspect a security breach, I must immediately notify the Agency Administrator and/or Community Technology Alliance.

User Code of Ethics:

- HMIS users must treat Partner Agencies with respect, fairness and good faith.
- Each user should maintain high standards of professional conduct in the capacity as a HMIS user.
- The user has primary responsibility for his/her client(s).

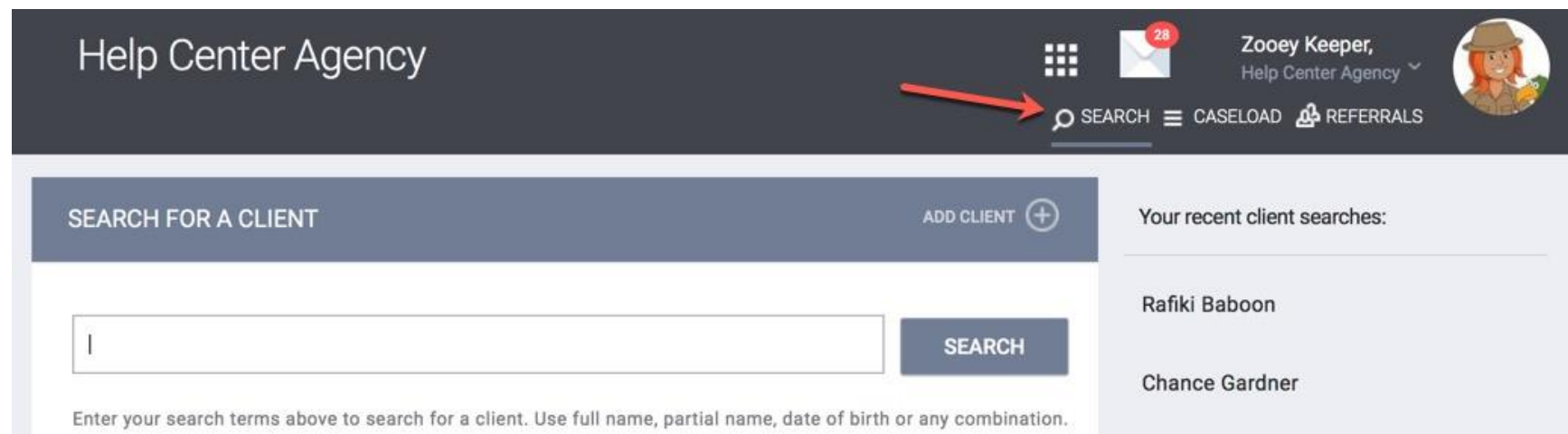
Search for Clients

Search Clients in your client database.

After logging into Clarity Human Services, you are placed at the center hub of the system which provides access to your clients with the Search tab.

To make sure that the client does not exist in the data base, search for the client before entering and creating a new file.

User's last five client search will display under ***Your recent client searches***.




The screenshot displays the user interface for the Help Center Agency. At the top, the header includes the agency name, a navigation menu with icons for a grid, a mail icon with a '28' notification badge, and the user's name 'Zoey Keeper, Help Center Agency' with a profile picture. A red arrow points to the 'SEARCH' button in the navigation menu. Below the header, the main content area features a search bar with the text 'SEARCH FOR A CLIENT' and an 'ADD CLIENT' button with a plus sign. The search bar contains a single character 'I' and a 'SEARCH' button. Below the search bar, a note reads: 'Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.' To the right of the search bar, a section titled 'Your recent client searches:' lists two entries: 'Rafiki Baboon' and 'Chance Gardner'.

Search for Clients by Name Aliases, Maiden Names, Nicknames, or SSN


When searching for a client, you can enter the first three letter of first and last names. Clarity has auto-suggest mechanism to find clients with a name that is difficult to spell.

The search feature allows you to enter a list of names a client goes by known as *Alias*. If the client goes by a different name than what is given when searched, update and enter the client's *Alias* name in client profile. If the client has multiple *Aliases*, they are separated by commas (red).

SEARCH FOR A CLIENT ADD CLIENT 

star			SEARCH
Arya Stark	07/09/2005	9809	
Orion Belt (12345, Stars, Constellation)	05/04/1988	2154	
Patrick Starr	09/07/2005	9809	
Star Bucks	02/09/1970	1289	

Last Updated
03/20/18




Search for Clients by Unique Identifier

Every client created in Clarity is issued a Unique Identifier, which is 9 characters in length. Searching based on the Unique Identifier will take you directly to the Client's profile screen, bypassing the need to search through the auto-suggest list.

The screenshot shows the Clarity client profile for 'Scrappy Doo'. The header includes the client name, navigation tabs (PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION), user information (Staff One, **CTA New User Training**), and a search icon. The main content area is divided into three sections: Client Profile, Household Members, and Active Programs.

CLIENT PROFILE	
Social Security Number	XXX - XX - 5034
Quality of SSN	Full SSN Reported
Last Name	Doo
First Name	Scrappy
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	02/02/1999 Adult. Age: 20



UNIQUE IDENTIFIER
B6F628017

Household Members		Manage
Scooby Doo	Uncle *	

Active Programs	
YHDP Program	
Housing for Health (S)	
North County Winter Shelter (ES)	

Refining Your Search

As the client database grows, you may find that the results listed can be large for a common name (e.g. John).

You can refine your search by combining your search terms until the result is shorter, or you find your given client. For example, a search term of “John 8089” will search for a combination of a partial First Name, Last Name, and the last four digits of the Social Security Number.

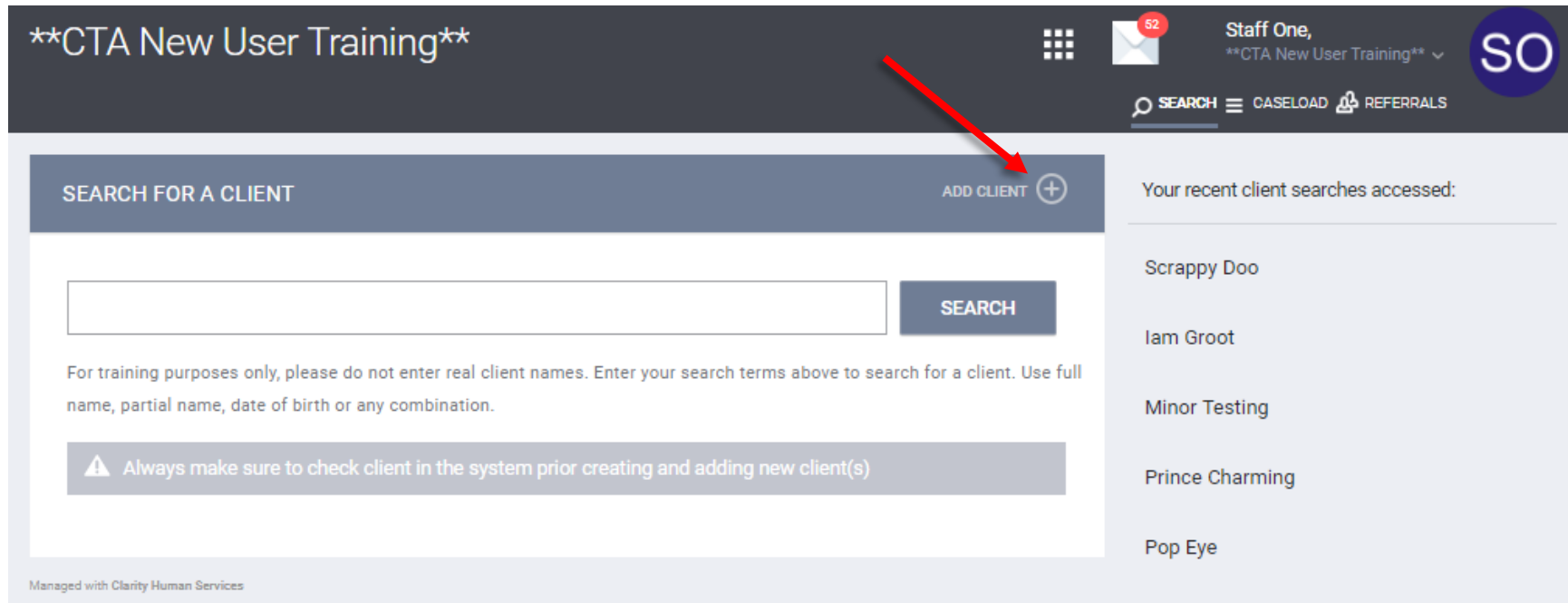
The screenshot shows a web interface for searching clients. At the top left, there is a dark blue header with the text "SEARCH FOR A CLIENT" and an "ADD CLIENT" button with a plus icon. Below this is a search input field containing the text "John 8089". To the right of the input field is a dark blue "SEARCH" button. A dropdown menu is open below the input field, showing a single result: "John Doe" with a mouse cursor pointing to it, followed by the date "09/29/1989" and the number "8089". To the right of the dropdown, the text "or any combination." is partially visible. On the far right, there is a sidebar titled "Your recent client searches:" which lists three items: "Mufasa Lion", "Rafiki Baboon", and "Chene Gardner".

Creating New Client Profile

If after a thorough search, you have determined that your client does not exist in the system, click *Add Client* in the upper right corner of the Search screen.

This will take you to Client Profile creation page.

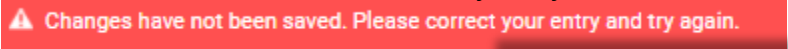
Note: It is by default that Clarity will assign the user who enrolls the client into the Agency Program as the Case Manager (Assigned Staff). To change Case Manager (Assigned Staff) go to page [\(49\)](#).



The screenshot displays the Clarity Human Services interface. At the top, there is a dark header with the text "**CTA New User Training**" on the left, a grid icon, a notification icon with "52", the user name "Staff One, **CTA New User Training**", and a "SO" logo. Below the header, the main content area is titled "SEARCH FOR A CLIENT". On the right side of this header, there is an "ADD CLIENT (+)" button, which is highlighted by a red arrow. Below the header, there is a search input field and a "SEARCH" button. A message below the search field reads: "For training purposes only, please do not enter real client names. Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination." Below this message is a warning box with a triangle icon and the text: "Always make sure to check client in the system prior creating and adding new client(s)". On the right side of the main content area, there is a section titled "Your recent client searches accessed:" with a list of client names: "Scrappy Doo", "Iam Groot", "Minor Testing", "Prince Charming", and "Pop Eye". At the bottom left of the page, it says "Managed with Clarity Human Services".

Creating New Client Profile- Core Data Fields

The first fields of the Client Profile creation page are termed *core data fields*.

Enter all required fields. If one field is left blank and you try and save after filling in the Release of Information, an alert highlighted in red will appear: 

Quality of... SSN/Name/DOB

Have a drop down side bar with options of:

- Full (SSN, Name, or DOB) Reported
- Approximate or Partial Reported
- Client Doesn't Know
- Client Refused
- Data Not Collected

Alias: This field allows you to enter a list of names a client goes by. Clients may have aliases, or past names. (i.e., maiden names, nicknames, etc.) This allows other staff member and/or agencies search for the client's record using any of the names or previous IDs entered into the *Alias* field.

Veteran Status: If the client is 18 and over, the *Veteran Status* field will appear. Note, this is not a required field unless the program is under SSVF funding.

CREATE A NEW CLIENT

Social Security Number	<input type="text" value="- - -"/>	
Quality of SSN	<input type="text" value="Select"/>	▼
Last Name	<input type="text"/>	
First Name	<input type="text"/>	
Quality of Name	<input type="text" value="Select"/>	▼
Quality of DOB	<input type="text" value="Select"/>	▼
Date of Birth	<input type="text" value="01/01/1980 "/>	Adult. Age: 38
Middle Name	<input type="text" value="None"/>	▼
Alias	<input type="text"/>	
Gender	<input type="text" value="Select"/>	▼
Race	<input type="text" value="Select"/>	▼
Ethnicity	<input type="text" value="Select"/>	▼
Disabling Condition	<input type="text" value="Select"/>	▼
Veteran Status	<input type="text" value="Select"/>	▼
Primary Phone Number	<input type="text" value="XXX-XXX-XXXX"/>	

Please fill in Release of Information form
CANCEL

Creating New Client Profile- Release of Information

After entering all required fields, *Release of Information* located on the corner top right must be entered before being able to save the client profile.

Help Center Agency | Zoey Keeper, Help Center Agency

SEARCH | CASELOAD | REFERRALS

CREATE A NEW CLIENT

Social Security Number	345 - 93 - 5982
Quality of SSN	Full SSN Reported
Last Name	Duke
First Name	Daisy
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	08/08/1989 Adult. Age: 28
Middle Name	None
Alias	Jessica
Gender	Female
Race	White
Ethnicity	Non-Hispanic/Non-Latino
Veteran Status	No

RELEASE OF INFORMATION

Permission	Yes
Start Date	11/03/2017
End Date	11/03/2022
Documentation	Select

Please fill in Release of Information form

CANCEL

Creating New Client Profile- Release of Information

Permission

- Yes - Client provided consent
- No - Client did not provide consent

Start Date

This is the date that the client signed the ROI. The *Start Date* defaults to today's date, but it must be configured to reflect the actual date the ROI was signed by the client, if it was not signed on the current day.

End Date

This is the date that the ROI will expire. It will default to the expiration date configured by the HMIS System Administrator.

Documentation

Enter the way in which the ROI was stored. There are several options listed:

- **Electronic Signature** - If Electronic Signature is selected, a black button **E-SIGN DOCUMENT** will be present. Click on it to complete the electronic signature form. The client can sign the form with their finger/stylus.
- **Attached PDF** - This will prompt the end user to upload the PDF, which must have the client signature.
- **Signed Paper Consent or Outside Agency Verified** - Enter your location in the *Location* text box that appears.
- **Verbal Consent** - Select if consent was verbally given by the client.
- **Household or Group Member** - Select if the client is a minor and an adult household/group member signed the ROI.
- **None** - Select if no ROI was obtained.

Select **ADD RECORD** once all data have been entered.

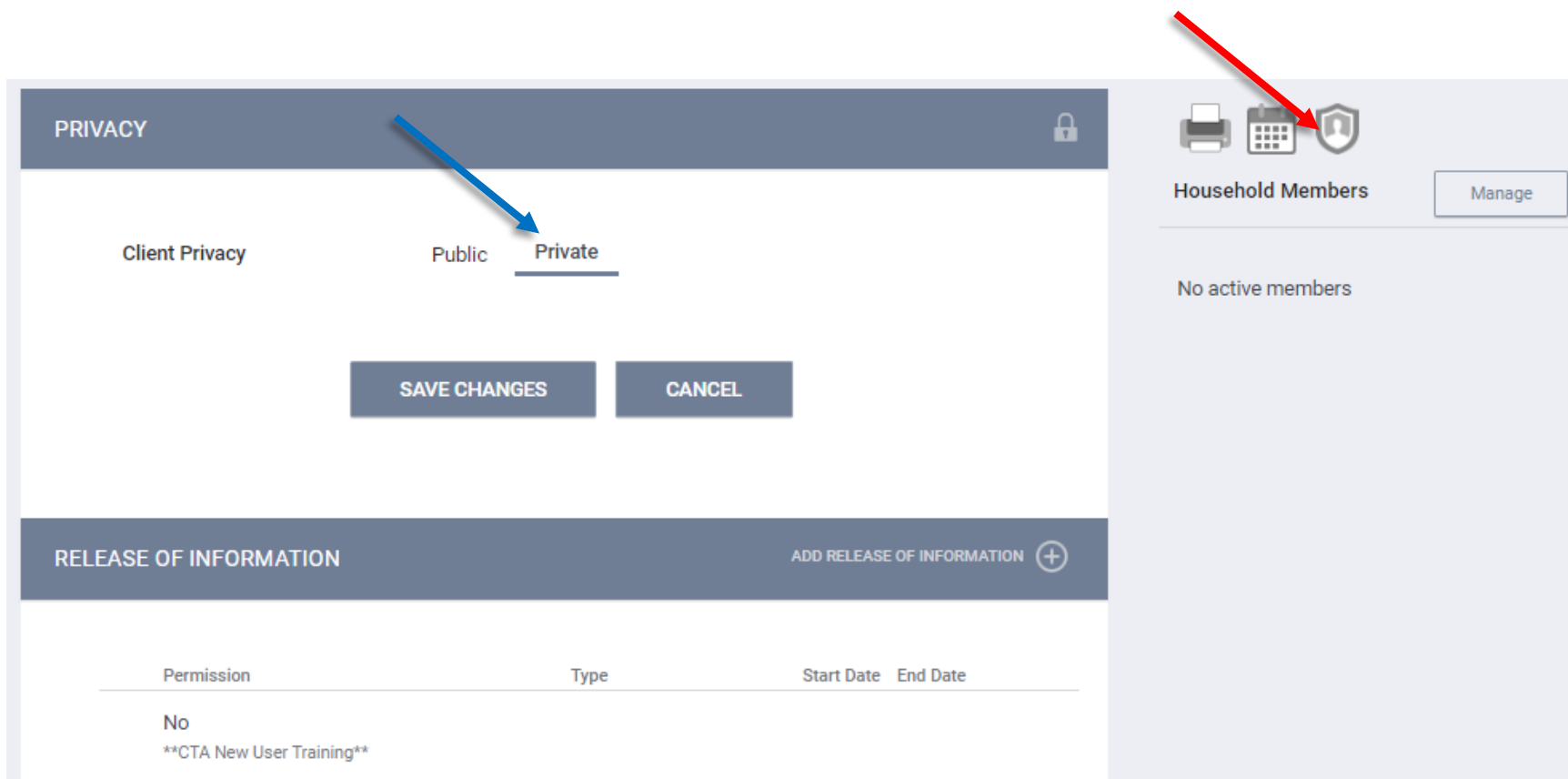
The screenshot shows a web form titled "RELEASE OF INFORMATION". It contains four rows of input fields:

RELEASE OF INFORMATION		
Permission	Yes	▼
Start Date	11/03/2017	📅
End Date	11/03/2022	📅
Documentation	Select	▼

Creating New Client Profile- Setting Client Record to Private

When clients requests for their data to not be shared outside of the agency, or programs are required to enter specific clients to private, users must set the client's file to Private. To make a client record private, go to the client's profile and locate the shield icon (red arrow). Click on Private (blue arrow) and click Save Changes.

Note that Privacy Management is authorized to the Agency that created the Client. Also, client records cannot be set to Private if there are records from multiple Agencies.



The screenshot displays the 'PRIVACY' settings for a client profile. The 'Client Privacy' section shows two options: 'Public' and 'Private'. The 'Private' option is selected, indicated by a blue arrow. Below these options are 'SAVE CHANGES' and 'CANCEL' buttons. The 'RELEASE OF INFORMATION' section is visible below, with a table containing one entry: 'No' for Permission, '**CTA New User Training**' for Type, and blank fields for Start Date and End Date. On the right side, the 'Household Members' section shows 'No active members' and a 'Manage' button. A red arrow points to the shield icon in the top right corner of the interface.

Permission	Type	Start Date	End Date
No	**CTA New User Training**		

Manage Family/Household Member

After creating a new client, it is by default that the client will not be a member of Family or Household. To manage Family/Household members, click on *Manage* button on the top right sidebar within the Client profile.

The screenshot displays the 'Daffy Duck' client profile interface. The top navigation bar includes the client name, a menu icon with a '2' notification, a grid icon, an email icon with a '31' notification, the user 'Zoey Keeper, Help Center Agency', and a profile picture. Below the navigation bar are tabs for 'PROFILE', 'HISTORY', 'PROGRAMS', 'SERVICES', 'ASSESSMENTS', 'NOTES', 'REFERRALS', 'LOCATION', and 'FILES'. A search bar and 'CASELOAD' link are also present.



The main content area is titled 'CLIENT PROFILE' and contains a table of client information:


Social Security Number	XXX - XX - 0459
Quality of SSN	Full SSN Reported
Last Name	Duck
First Name	Daffy
Quality of Name	Full name reported

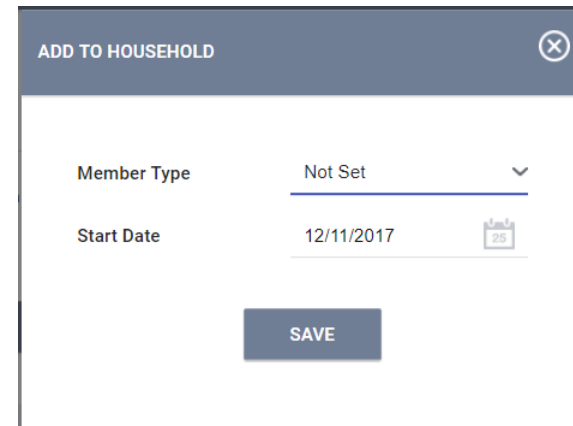
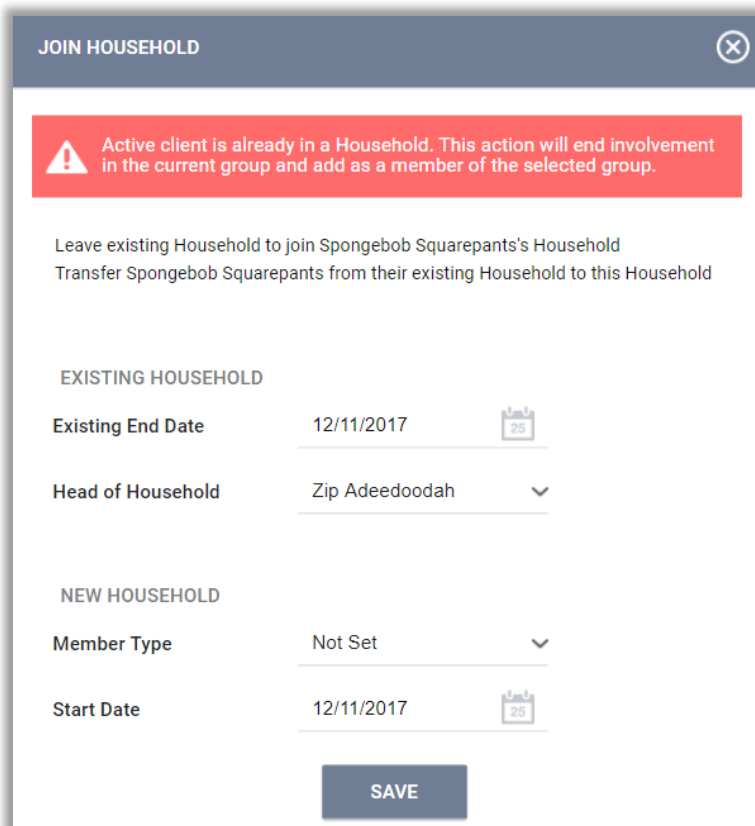
To the right of the table is a placeholder for a client photo and a 'UNIQUE IDENTIFIER' box containing the value 'FAD1B36C1'.


On the right sidebar, under the 'Household Members' section, there is a 'Manage' button highlighted with a red box. Below this section, it states 'No active members'.

Manage Family/Household Members- Add/ Join

On the right side bar, the 10 most recently accessed clients will appear under *Your recent client searches accessed*. (If the client you wish to add as a member of the family is not under your recent search, go to next page.) If the client is indeed a member, hover over the name and an icon of  or  will appear.

Add  option are clients that are not in any members of Family/Household. Clicking on the plus icon will display a window requesting a *Member Type* and *Start Date*. Set the *Member Type* for the client in the dropdown menu and select the *Start Date*, then select Save.

Join  option are clients that are already a member of a different household.

If the current client has no active Family/Household members, then the client can join that household by clicking the *Join* button.

Clients cannot be in two distinct households at the same time. If the current client is already a member of a Family/Household, a pop-up will appear with options:

- *Leave existing Household to join another client's Household*
- *Transfer other client from their existing Household to this Household*

Manage Family/Household Members- Household Management

Household Members can also be managed with *Searching for a Household Members* (blue arrow) within the client profile after clicking *Manage* button.

Once the household member is searched, Add or Join functionality will be displayed when hovered over the client's name (green arrow).


★ Indicates Head of Household in *Household Members* (red arrow).

The screenshot shows the 'Pumba Warthog' client profile page. The top navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'SERVICES', 'ASSESSMENTS', 'NOTES', 'REFERRALS', 'LOCATION', and 'FILES'. The user 'Zoey Keeper, Help Center Agency' is logged in. The main content area is titled 'HOUSEHOLD MANAGEMENT' and features a search box with 'rafiki' entered and a 'SEARCH' button. Below the search box is a table of search results. The first result is 'Rafiki Baboon', an existing group with 6 members, and a 'Join' button is visible next to it. To the right, a 'Household Members' sidebar lists 'Pumba Warthog' as 'Other *' and 'Timon Meercat' as 'Other'. A 'Your recent client searches accessed:' section lists several other clients and their IDs. A blue arrow points to the 'SEARCH' button, a green arrow points to the 'Join' button, and a red arrow points to the star icon next to 'Other *'.

Client	Date of Birth	Last Four SSN	Last Updated
Rafiki Baboon Existing Group. Head of Household: Mufasa Lion . Members: 6	03/09/00	1111	08/28/17

Your recent client searches accessed:	
Daffy Duck	0459
Rafiki Baboon	1111
Mufasa Lion	4589
Marlin Clownfish	7898
Daisy Duck	1329

Client's Family/Household Membership-Changing Head of Household or Exiting


To remove a client from the Household Member Group or edit Head of Household, hover and click the edit  symbol (red) next to the client's name.

This will open the *Edit Global Household*. In *Edit Global Household*, you can manage and edit the *Member Type*, *Head of Household*, *Joined Household* date, and *Exited Household* tab.

Change the Head of Household: Simply click the drop down icon (green) and select the client's name to be the Head of Household and click save.

Exit: To exit a member of the household, check the *Exited Household* tab (blue) and, in the date field, select the end date to stop the client's participation in the group and click save. The client will be a member in the group and automatically be removed after the chosen date has passed.


Household Members


Michael Jackson	Not Set ★
Zip Adeedoodah	Nephew 


Your recent client searches accessed:


Spongebob Squarepants	0980
Batman Im	6789

EDIT GLOBAL HOUSEHOLD

Member Type: Nephew 

Head of Household: Michael Jackson 

Joined Household: 12/11/2017 

Exited Household: 

December 2017

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Convenient Right Side Bar

The right sidebar in the client Profile page provides information about Household Members, as well as listing Active Programs, Recent Services, and Assigned Staff. To the right of each entry is an edit icon which will take you directly to the appropriate section of the client record.

Zip Adeedoodah

Elle Bravo, Agency A

MC

PROFILE SERVICES HISTORY PROGRAMS ASSESSMENTS NOTES FILES LOCATION

SEARCH CASELOAD

CLIENT PROFILE

Social Security Number: XXX - XX - 1111

Quality of SSN: Full SSN Reported

Last Name: Adeedoodah

First Name: Zip

Quality of Name: Full name reported

Quality of DOB: Full DOB Reported

Date of Birth: 01/01/2010 Child. Age: 8

UNIQUE IDENTIFIER: 7E63C28C2

SAVE CHANGES CANCEL

Managed with Clarity Human Services

Household Members Manage

- Michael Jackson: Father*
- Prince Charming: Grandparent
- Cat Hat: Wife

Active Services

- ES NBN Bed Night:Adult Only Bed
- Dining Hall:Breakfast

Active Programs

- NBN ES

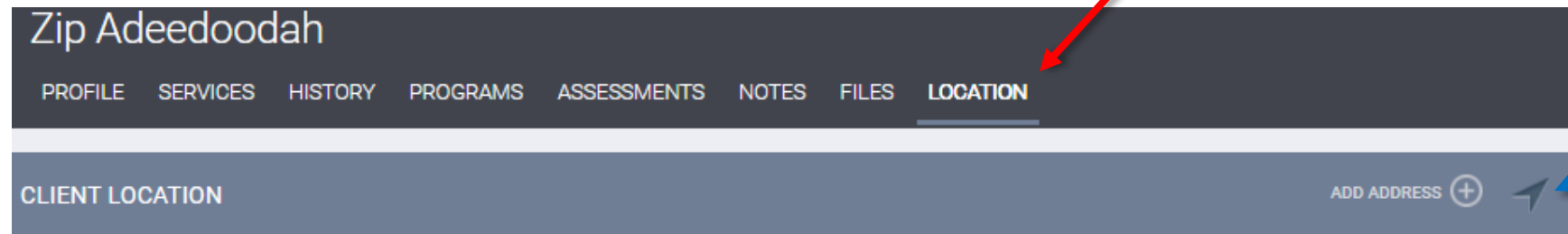
Assigned Staff 1

MC


Creating and Editing Client Locations- Locate

Manage client's information on the Location tab, including how to create and maintain client address.

To manage client address information, select *Location* tab (red) in the Client Record.



Locate

If your current location is what you want to record, select the locating arrow  (blue) at the top right corner of the screen. This feature will then use Google Maps to determine your location based on your GPS location.

Note: In order for this feature to be successful, Location Services must be turned on for the device you are using to enter client data.


The location is auto-filled in the *Field Interactions* section of the screen. This feature is particularly helpful when you are in the field and need to enter your current location.

For client confidentiality reasons, this section hides the collected location at default. Click the arrow link (green) to expose the data. Locations collected using this method are marked with a yellow location pin.






Creating and Editing Client Locations- Add Address

Add Address

You can also add client's address by clicking the **ADD ADDRESS**  link in the top right corner of the *Location* tab. This will open the *Client Location* screen, where you can enter the address information.

ADD CLIENT LOCATION

Address Type	Home	▼
Name	<input type="text"/>	
Address (line 1)	<input type="text"/>	
Address (line 2)	<input type="text"/>	
City	<input type="text"/>	
State	Alabama	▼
Zip Code	<input type="text"/>	
Location Date	<input type="text"/>	
Active Location	<input checked="" type="checkbox"/>	
Private	<input type="checkbox"/>	
Note	<div><p>B <i>I</i>  </p><input type="text"/></div>	

SAVE CHANGES **CANCEL**

Note: When the Active Location box is checked, it is considered that the client can be located at this address.

Client Location Distance to Agency

Once an address is uploaded with a valid zip code, the Location tab will show all active addresses plotted on the Map.



Blue pin on map indicated the agency's location. Hover on top of the pin and the Agency's address will be displayed.



Red pin on map indicates the client's location.

View of the map can also be changed with the drop down arrow- from *Satellite* to *Map* on the corner top left of the map.

Zip Adeedoodah

PROFILE
SERVICES
HISTORY
PROGRAMS
ASSESSMENTS
NOTES
FILES
LOCATION

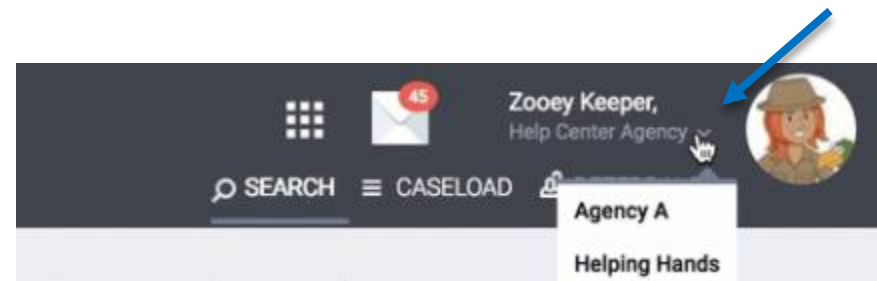
CLIENT LOCATION ADD ADDRESS + ➔

The map shows Santa Cruz, CA, with a blue pin at the agency location and a red pin with a white 'A' at the client location. The map is in satellite view, as indicated by the 'Satellite' dropdown in the top left corner of the map area.

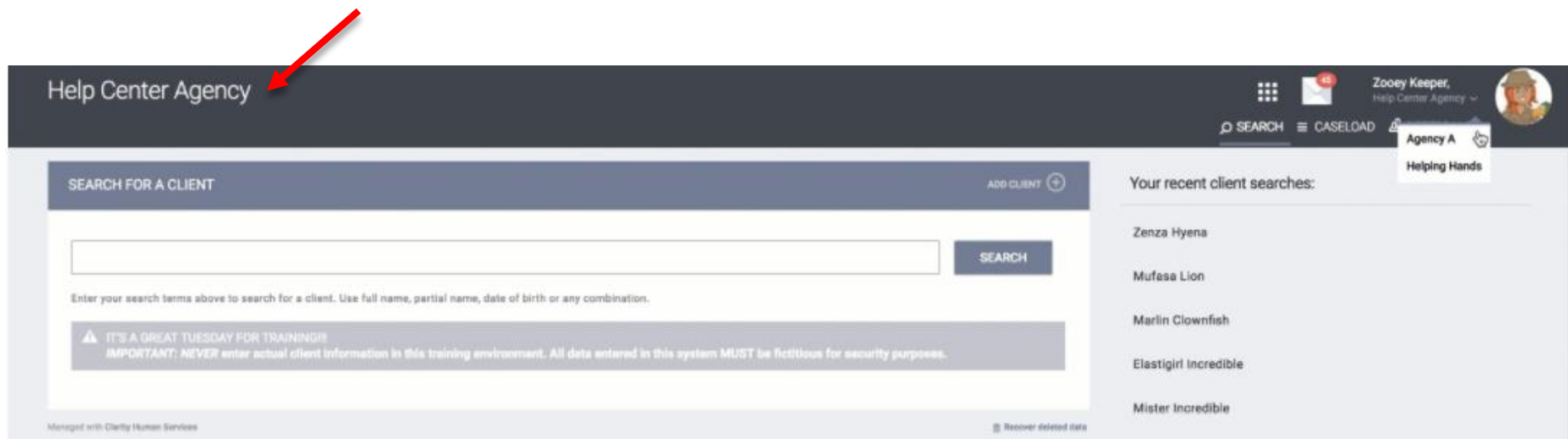
Address	Date
A Temporary: 7807 Soquel Dr., , Aptos, CA , 95003	01/02/2018

Switching Agencies

To ensure data accuracy, select the appropriate agency for records, program enrollment, and/or providing services. Agency selections are available next to the user name on the upper right corner of the screen.



The agency that the user is currently working on is displayed on the upper left corner of the screen (*red arrow*) as well as on the drop down menu under the user's name (*blue arrow*).



Program Based Transaction

Program-Based services can only be provided once a client is enrolled into a Program. Click on the *Programs* tab- top menu of the client record (*red arrow*).

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.

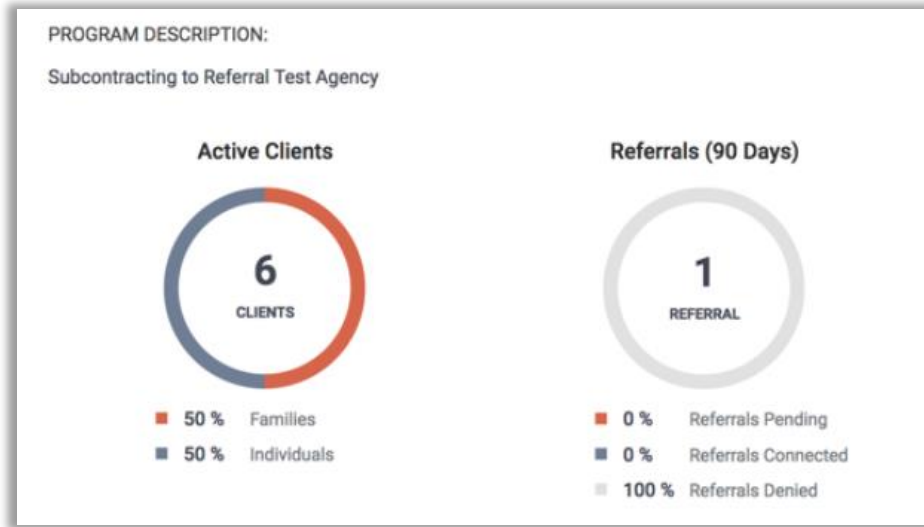
To enroll a client/household into a program, select the drop down arrow (*blue arrow*) next to the applicable program title under *Programs: Available*.

The screenshot displays the client record interface for 'Zip Adeedoodah'. The top navigation bar includes tabs for PROFILE, SERVICES, HISTORY, PROGRAMS (highlighted with a red arrow), ASSESSMENTS, NOTES, FILES, and LOCATION. Below the navigation bar, there are two main sections: 'PROGRAM HISTORY' and 'PROGRAMS: AVAILABLE'. The 'PROGRAM HISTORY' section shows 'There are no results to display'. The 'PROGRAMS: AVAILABLE' section contains a table with one row: 'NBN ES'. A blue arrow points to a small downward-pointing chevron icon at the end of the 'NBN ES' row, indicating a dropdown menu.

PROGRAMS: AVAILABLE
NBN ES

Program Description

The program description provides a brief overview of the program, typically including the target population(s) and general service(s).



Funding Source
HUD:CoC – Permanent Supportive Housing

Availability
Limited Availability

Service Categories:

Housing Employment

This section indicates the categories of the different services this program provides (e.g. Housing, Employment).

Include group members:

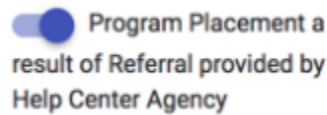
- Nala Lioness
- Sarabi Lion
- Scar Lion
- Simba Lion

If your client is part of a household/family, you will be automatically prompted to select family/household members to include in the program. It is important to note that you must have already created a family/household to have this feature. Click on the switch, the blue indicates on.

Program Description- Continued

Referral Checkbox

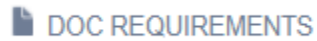
If the program enrollment is conducted as a result of a referral, a checkbox will appear:



Selecting the checkbox will make the system automatically include the referral in the client's Program History. This allows users to easily identify whether a program placement is due to a referral.



Selecting *Print Directions* icon allows you to map and print directions from your current location or an alternate location. These directions can be programmed for directions by car, foot, bicycle, or bus.



Selecting *Doc Requirements* allows you to print a checklist of all required documents that the client needs to enter the program.

Program Enrollment

ENROLL

After clicking *Enroll* icon, you will be taken to the Program Enrollment page for your original client. This page will present program specific data element necessary to complete the program enrollment.

Note: If you are enrolling other household/family members, there will be a Save and Next button. Selecting this will enroll the current member, and automatically take you to the correct program enrollment screen for the next member.

Rafiki Baboon

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

Zoey Keeper, Help Center Agency

SEARCH CASELOAD

Enroll Program for client Rafiki Baboon

Project Start Date

Relationship to Head of Household

DISABLING CONDITIONS AND BARRIERS

Disabling Condition

Physical Disability

Developmental Disability

Chronic Health Condition

HIV - AIDS

Mental Health Problem

Substance Abuse Problem

HEALTH INSURANCE

Covered by Health Insurance

ENROLLING PROGRAM

Program Type: Group (2)

Assigned Staff:

Head of Household:

Program Group Members

Nala Lioness

SAVE & NEXT **CANCEL**

Audit Log

Program Enrollment- Data Intake


Enroll Program for client Big Bird

Project Start Date	01/01/2018		
Relationship to Head of Household	Self (head of household) ▼		
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response) ▼		
LIVING SITUATION			
Type of Residence	Rental by client, no ongoing housing subsidy ▼		
Length of Stay in Prior Living Situation	One week or more, but less than one month ▼		
Length of Stay Less Than 7 Nights	No ▼		
DISABLING CONDITIONS AND BARRIERS			
Disabling Condition	Yes ▼		
Physical Disability	Yes ▼	Long Term	Select ▼
Developmental Disability	Yes ▼	Substantially Impairs Independence	Select ▼
Chronic Health Condition	Yes ▼	Long Term	Select ▼
HIV - AIDS	Yes ▼	Substantially Impairs Independence	Select ▼
Mental Health Problem	Yes ▼	Long Term	Select ▼
Substance Abuse Problem	Both Alcoho ▼	Long Term	Select ▼
Domestic Violence Victim/Survivor	Yes ▼	Last Occurrence	Select ▼
Are you currently fleeing?	No ▼		

*Tool tip: when hovered over a certain question, a short description will appear.

Based on the type of answer given, the field will expand for more selections. i.e.) If the client said yes to *Physical Disability* it will prompt another field: *Long Term* and the options of *Yes, No, Client doesn't know, Client refused, or Data not collected* can be selected.

Program Enrollment- Data Intake- Cash Income

CASH INCOME FOR INDIVIDUAL	
Income from Any Source	Yes
Earned Income	<input checked="" type="checkbox"/> Amount 150
Unemployment Insurance	<input type="checkbox"/>
Worker's Compensation	<input type="checkbox"/>
Private Disability Insurance	<input checked="" type="checkbox"/> Amount 100
VA Service-Connected Disability Compensation	<input type="checkbox"/>
Social Security Disability Insurance (SSDI)	<input type="checkbox"/>
Supplemental Security Income (SSI)	<input type="checkbox"/>
Retirement Income from Social Security	<input type="checkbox"/>
VA Non-Service Connected Disability Pension	<input type="checkbox"/>
Pension or Retirement Income from a Former Job	<input type="checkbox"/>
Temporary Assistance for Needy Families (TANF)	<input type="checkbox"/>
General Assistance (GA)	<input type="checkbox"/>
Alimony and Other Spousal Support	<input type="checkbox"/>
Child Support	<input type="checkbox"/>
Other Cash Income	<input type="checkbox"/>
Total Cash Income for Individual	250.00 

If *Income from Any Source* is selected *Yes*, this will prompt other cash income.

Click the switch to enter client's source of earned income.

If the client has multiple source, the *Total Cash Income for Individual* (*red arrow*) will auto calculate the total amount.


Program Enrollment- Permanent Housing


If client is enrolled in Permanent Housing Project, remember to record **Housing Move-In Date** (*red arrow*) to which a client or household moves into a permanent housing unit. This can only be entered at the enrollment screen. If a client moves into a permanent housing after the project start date, the user must go to the enrollment screen and enter the Housing Move-In date when the client moved in.


Mickey Mouse

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION



Enroll Program for client Mickey Mouse

Project Start Date 03/14/2019 


Is the Client an Adult or Head of Household? Yes (Automatically Generated Response) 


Is the Program Type a Permanent Housing Program Type? Yes (Automatically Generated Response) 

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date  

LIVING SITUATION

Prior Street Address Prior Address Data Quality 

Prior City Prior State 

Zip Code of Last Address


Program Enrollment - Date of Engagement

If client is being enrolled in Emergency Shelter Night-by-night (ES NBN) and Street Outreach (SO) programs, please remember to enter the **Date of Engagement** (*red*). The date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan. To record the date the client became 'engaged' in project services after one or more contacts with a street outreach project or night-by-night shelter. This date may be on or after the project start date and must be prior to project exit. Date of Engagement collection is at Enrollment Screen only.



Mickey Mouse

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION

Enroll Program for client Mickey Mouse

Project Start Date	03/14/2019	
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response)	▼
Is the Program Type Either Emergency Shelter, Safe Haven, or Street Outreach?	Yes (Automatically Generated Response)	▼
Is the Program Type Either Street Outreach or a Night-by-Night Emergency Shelter?	Yes (Automatically Generated Response)	▼

COMPLETE DATE OF ENGAGEMENT WHEN CLIENT HAS BEEN ENGAGED

Date of Engagement	__/__/__		
--------------------	----------	---	---

LIVING SITUATION

Prior Street Address	_____	Prior Address Data Quality	Select	▼
----------------------	-------	----------------------------	--------	---

Program Enrollment- Services

After enrolling the client into the program, it automatically directs you to *Provide Services* (red).

To handle each service transaction component, go to:

Basic Service Transactions see [page 33](#)

Transactions with Expense see [page 34](#)


Time Based Transactions see [page 35](#)

*Note that the tabs under the Client's name are connected to the client profile

The tabs in the Program are associated with the actual Program Enrollment.

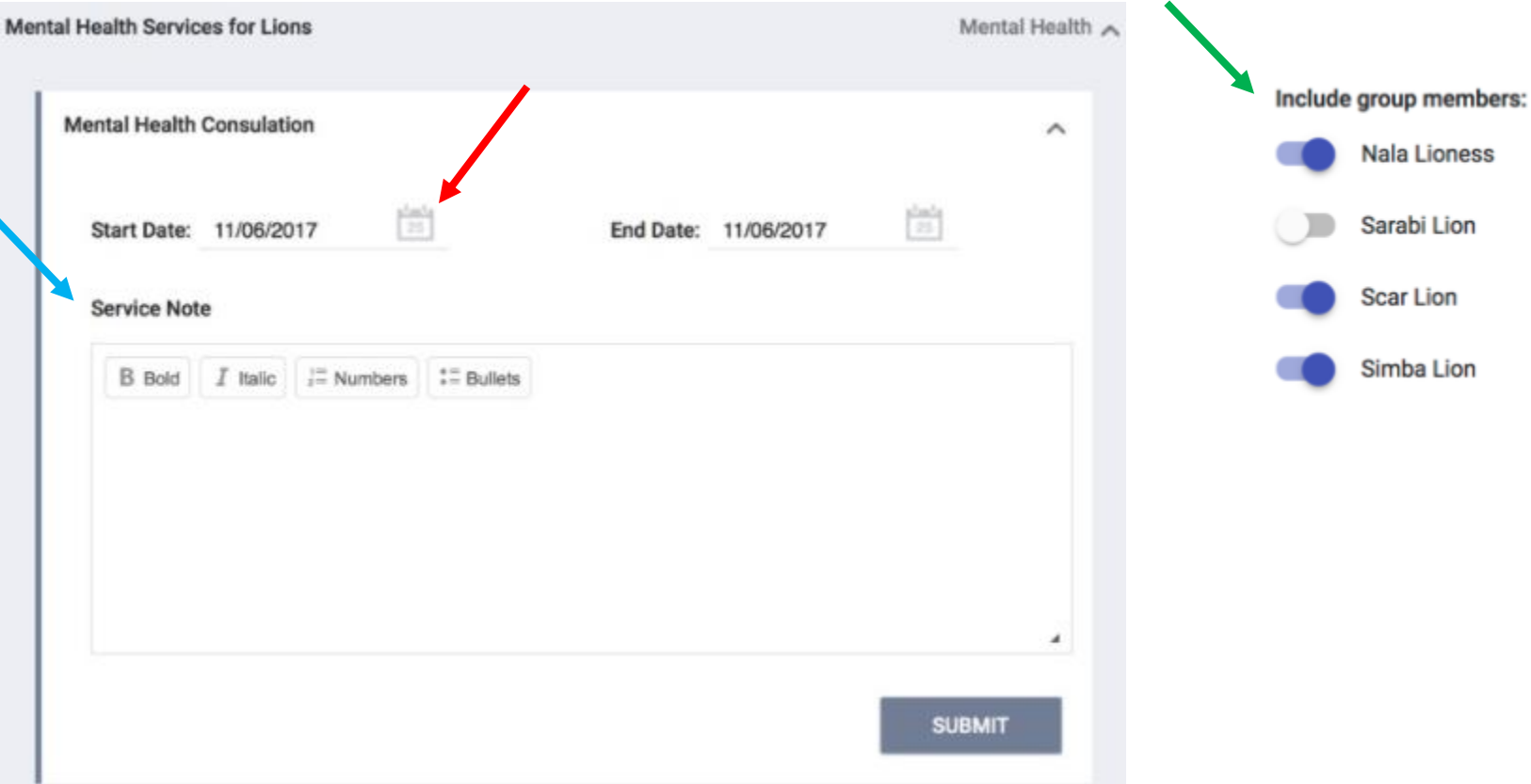
The screenshot displays the 'Big Bird' software interface. At the top, there is a dark header with the 'Big Bird' logo and a navigation menu with tabs: PROFILE, SERVICES, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, and LOCATION. The 'PROGRAMS' tab is currently selected. Below this, a blue bar indicates the current program: 'PROGRAM: KERRI'S SERVICE ONLY TRAINING PROGRAM'. Underneath, there is a secondary navigation menu with tabs: Enrollment, History, Provide Services, Assessments, Notes, Files, Forms, and an 'Exit' button. The 'Provide Services' tab is highlighted with a red underline and a red arrow points to it from the text above. Below the navigation menu, the main content area is titled 'Services' and contains a list of service items: 'Bus Pass' with a dropdown menu showing 'Transportation', and 'Case Management' with a dropdown menu showing 'Case Management'.

Basic Service Transaction

In a Basic Service Transaction, the only required fields are Start Date and End Date. By default, these services provide one day of service on the date that the transaction is documented; you can alter the dates by clicking the calendar icon  (red)



Service note (blue)- An optional tool to make notes about the service given. (e.g. “Had a successful consultation with client.”)

Include group members (green)- Some services are configured so that other members of the family also receives the Service Transaction. If the service is equipped with this feature, click on the toggle tab, the selected member will automatically receive the service transaction as well.



Mental Health Services for Lions

Mental Health Consultation

Start Date: 11/06/2017  End Date: 11/06/2017 

Service Note

B Bold *I* Italic **123** Numbers **•••** Bullets

SUBMIT

Include group members:

- Nala Lioness
- Sarabi Lion
- Scar Lion
- Simba Lion

Transaction with Expense

Some services will be accompanied with an expense amount. In this scenario, you are requested to provide an *Expense Amount*, *Expense Date*, and *Funding Source*.

- **Expense Amount** - Depending on the setup of the service, this may be either an adjustable or a pre-determined amount that cannot be modified.
- **Expense Date** - The date the expense was issued.
- **Funding Source** - Depending on the setup of the service, this may be adjustable, or automatically set to a pre-determined funding source.



The screenshot displays the 'Case Management for Lions' web application interface. The main form area is titled 'Case Management' and includes the following fields and options:

- Start Date:** 11/06/2017 (with a calendar icon)
- End Date:** 11/06/2017 (with a calendar icon)
- Expense Amount:** 10.00
- Expense Date:** 11/06/2017 (with a calendar icon)
- Funding Source:** A dropdown menu is open, showing the following options: 'Do Not Charge', 'No Funding Source' (which is selected with a checkmark), 'Private Funding', 'Funding Source 1', 'Funding Source 2', and 'Funding Source 3'.
- Service Note:** A text area with a rich text editor toolbar containing 'Bold', 'Italic', 'Numbers', and 'Bullets' buttons.

A 'SUBMIT' button is located at the bottom right of the form.

Time Based and Time Tracking

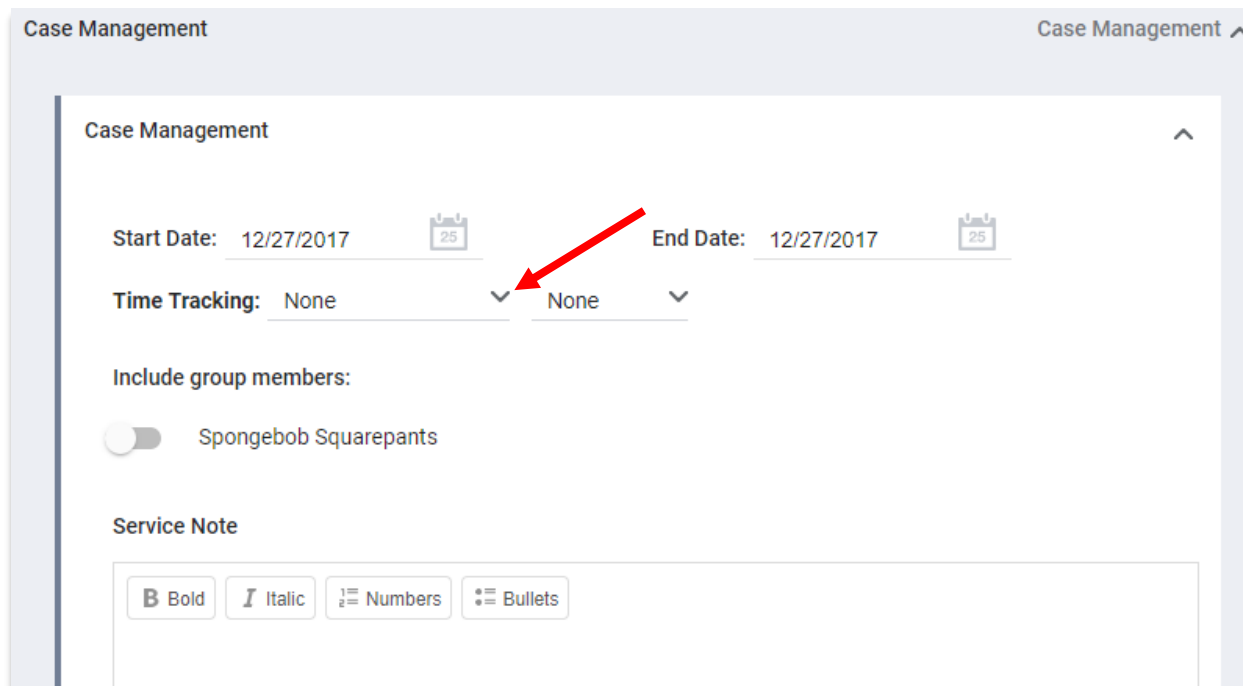
Service Transactions that occurs more than once a day can be time-based.

When you select a service, the current date and time will be displayed; this can be adjusted if the service is on a different date or time by clicking on the  calendar icon  and the clock icon.





Water Bottle



Date: 12/27/2017  Time: 09:27 AM 



Case Management Case Management ^

Case Management ^



Start Date: 12/27/2017  End Date: 12/27/2017 


Time Tracking: None  None 

Include group members:

Spongebob Squarepants

Service Note

B Bold **I** Italic  Numbers  Bullets

A function with time tracking like in the *Case Management* service allows you to keep track of how much time you have spent on a service. Simply enter how much time you have spent on the service by clicking the drop down  icon (red) and select by the hour; the minutes are in increments of 15.

Current Living Situation

Street Outreach, Emergency Night by Night Shelter, PATH, & CoC YHDP users must record each contact with people experiencing homelessness. The first Current Living Situation with the client will occur at the same point as Project Start Date (and recording of client's Prior Living Situation) and therefore requires a record to be opened in the HMIS for the client.

To enter a client's Current Living Situation, after enrolling the client, go to Program-Assessments (**red arrow**) and click START on Current Living Situation (**blue arrow**), toggle on any household members who are adults or heads of household.

The screenshot displays the HMIS interface for a client. At the top, a navigation bar includes 'PROFILE', 'HISTORY', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', and 'LOCATION'. Below this, a header indicates the program: 'PROGRAM: PROGRAM A-EMERGENCY SHELTER (NBN)'. A secondary navigation bar shows 'Enrollment', 'History', 'Assessments', 'Notes', and 'Files', with 'Assessments' highlighted by a red arrow. An 'Exit' button is also present. The main content area is titled 'Assessments' and includes a 'LINK FROM ASSESSMENTS' label. Three assessment entries are listed in light green boxes:

Assessment Type	Action
Status Update Assessment	START
Annual Assessment	START
Current Living Situation	START

A blue arrow points to the 'START' button for the 'Current Living Situation' assessment.

Assessments

Each agency will have list of assessments targeted to measure the unique needs of their client base. Consult with your agency manager to determine which assessment is the most appropriate for your client, as the Eligibility Engine must be turned on for the assessment to determine eligibility.

After you save, the Assessment Processor and Eligibility Processor will direct over to the eligibility screens where you can refer directly to eligible programs or you can refer the client to Community Queue (see next page.)

When Assessments are created, they will be in the Assessment History (red).

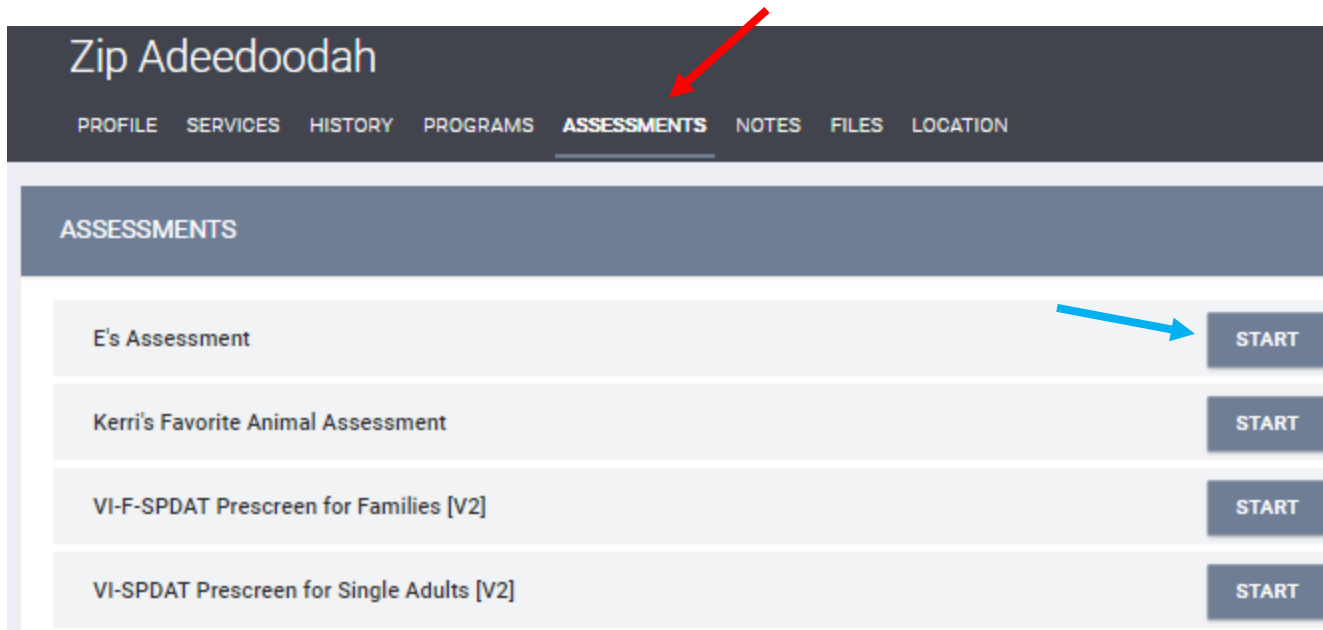
The screenshot displays the 'Big Bird' client management system interface. The top navigation bar includes the client name 'Big Bird', a grid icon, an envelope icon, the user name 'Elle Bravo, Agency A', and a search icon. Below the navigation bar, a menu of options is visible: PROFILE, SERVICES, HISTORY, PROGRAMS, ASSESSMENTS (highlighted), NOTES, FILES, LOCATION, and REFERRALS. The main content area is titled 'ASSESSMENTS' and lists six assessment items, each with a 'START' button:

Assessment Name	Action
E's Assessment	START
Kerri's Favorite Animal Assessment	START
VI-F-SPDAT Prescreen for Families [V1]	START
VI-F-SPDAT Prescreen for Families [V2]	START
VI-SPDAT Prescreen for Single Adults [V1]	START
VI-SPDAT Prescreen for Single Adults [V2]	START

Below the 'ASSESSMENTS' section is a dark blue bar labeled 'ASSESSMENT HISTORY', which is highlighted with a red arrow pointing to it from the left.

Referring to the Community Queue

To refer a client based on an Assessment score, go to the Assessments tab (**red**) in the client record and click *Start* next to the appropriate *Assessment* (**blue**).



The screenshot shows the client record for Zip Adeedoodah. The top navigation bar includes tabs for PROFILE, SERVICES, HISTORY, PROGRAMS, **ASSESSMENTS** (highlighted with a red arrow), NOTES, FILES, and LOCATION. Below the navigation bar is a section titled ASSESSMENTS. This section contains a list of four assessments, each with a corresponding START button (highlighted with a blue arrow):

Assessment Name	Action
E's Assessment	START
Kerri's Favorite Animal Assessment	START
VI-F-SPDAT Prescreen for Families [V2]	START
VI-SPDAT Prescreen for Single Adults [V2]	START

Community Queue-Program Eligibility Determination

After completing the assessment, click on

REFER DIRECTLY TO COMMUNITY QUEUE (red).

You may have to scroll down the page past eligible and ineligible programs to find the button.

PROGRAM ELIGIBILITY DETERMINATION

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	0	RISKS	0
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	1
VI-SPDAT-V2 PRE-SCREEN TOTAL		4	

Category -- All Categories -- Agency -- All Agenci Availability -- All -- **SEARCH**

Community Programs

Kerri's Permanent Supportive Housing System	PH - PERMANENT SUPPORTIVE HOUSING (...)
Kerri Test Program System	SERVICES ONLY
Kerri's Service Only Training Program Kerri's Test Agency	SERVICES ONLY

INELIGIBLE PROGRAMS

REFER DIRECTLY TO COMMUNITY QUEUE **CANCEL**

Community Queue

Click *Send Referral*. Now the Referral has been made.

Referred Program Indicates the program to which you are referring your client.

Referred-To Agency Indicates the agency that provides the program to which you are referring your client.

Referring Agency This is the agency from which the referral originated. (This will be your Agency)

Private Select this if you want the referral to be visible in the History tab of the client's record **ONLY** for the Referred-To agency.

Message Box Here you can send a secure message to the Referred-To agency regarding the referral.

REFERRAL: ADD

Referred Program	Community Queue
Referred to Agency	Community Queue
Referring Agency	Agency A
Private	<input type="checkbox"/>

B Bold
I Italic
123 Numbers
••• Bullets

SEND REFERRAL

CANCEL

Exiting a Client from a Program

To exit a client from a program, go to the Programs tab (red) from the client's record, mouse over the program name, and select the Edit icon (blue) that appears to the left. Once you are in the program edit screen, click the Exit button to the right (green).

The screenshot shows the client record for Zip Adeedoodah. The Programs tab is highlighted in red. A table lists the programs, with the 'NBN ES' program selected. A blue arrow points to the 'Edit' icon next to the program name. The program edit screen shows the 'Exit' button highlighted in green.

Program Name	Start Date	End Date	Type
NBN ES Agency A	12/30/2017	Active	Group

PROGRAM: NBN ES

Enrollment **History** Provide Services Forms

Program Service History

Service Name	Start Date	End Date
Basic Needs:Food Agency A	02/20/2018	02/27/2018

SELECT CLIENTS TO EXIT FROM PROGRAM

Zip Adeedoodah Nephew

Cat Hat Wife



END PROGRAM

When exiting a household, the option to exit several household members will appear. Simply toggle the switch next to the member(s) you wish to exit (purple), and their exit screens will appear in sequential order for each household member.


Exiting a Client from a Program-Open Services

If the client is scheduled for services that will occur after the program exit date, then these services will appear at the bottom of the Exit Program screen where you can conveniently close them by changing the end date (red) to the exit date. Click on Save & Next if exiting a household. Click

OPEN SERVICES

Service Name	Start Date	End Date	Change End Date
Dining Hall:Breakfast Agency A	01/16/2018	02/28/2018	02/28/2018 
Reservation: Motel and Hotel Vouchers:Bed Service Agency A	01/24/2018	01/30/2018	01/30/2018 

SAVE & NEXT **CANCEL**



Status Assessment

To conduct a status assessment, go to the *Programs* tab in the client's record (red), then click on the edit icon next to the correct Program (blue).


Spring Love

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES LOCATION

Elle Bravo, Agency A

SEARCH CASELOAD

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
 Kerri's Program A Agency A Edit	03/08/2018	Active	Group
NSEW Program Compass	03/08/2018	Active	Individual

PROGRAMS: AVAILABLE

NBN ES

Managed with Clarity Human Services

Household Members Manage


Spring Kid Daughter

Active Services


ES NBN Bed Night:Adult Only Bed

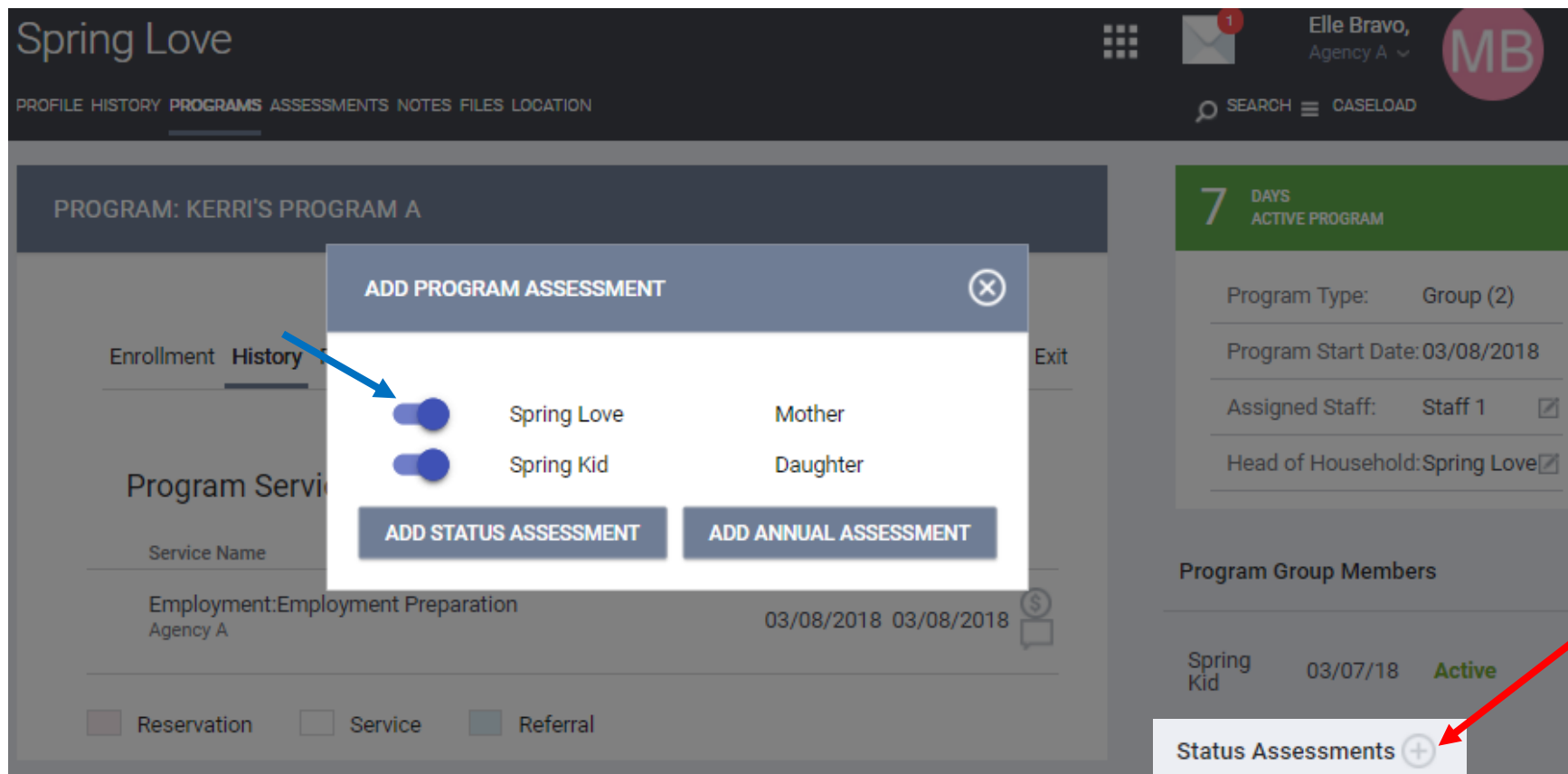
Active Programs

Kerri's Program A

NSEW Program 

Adding Status Assessment with Group Members

To add a Status Assessment for the client and selected group members, click Assessments in the client's program or the  icon (red) on the Status Assessment in the convenient right side bar. Click on the toggle to select members (blue), then click on *Add Status Assessment* or *Add Annual Assessment*. After completing the assessment, click *Save and Next* if conducting group assessment, after each member's assessment is complete click *Save and Close*.



The screenshot displays the 'Spring Love' client management interface. The main content area shows the client's profile for 'KERRI'S PROGRAM A', including enrollment history and program services. A modal dialog box titled 'ADD PROGRAM ASSESSMENT' is open, allowing the user to select members for assessment. The dialog lists two members: 'Spring Love' (Mother) and 'Spring Kid' (Daughter), both with their respective toggle switches turned on. Below the list are two buttons: 'ADD STATUS ASSESSMENT' and 'ADD ANNUAL ASSESSMENT'. A blue arrow points to the 'ADD STATUS ASSESSMENT' button. On the right side of the interface, there is a sidebar with program details and a 'Status Assessments' section. A red arrow points to the plus icon next to 'Status Assessments' in the sidebar.


ADD PROGRAM ASSESSMENT

Member	Role	Toggle
Spring Love	Mother	<input checked="" type="checkbox"/>
Spring Kid	Daughter	<input checked="" type="checkbox"/>

ADD STATUS ASSESSMENT **ADD ANNUAL ASSESSMENT**

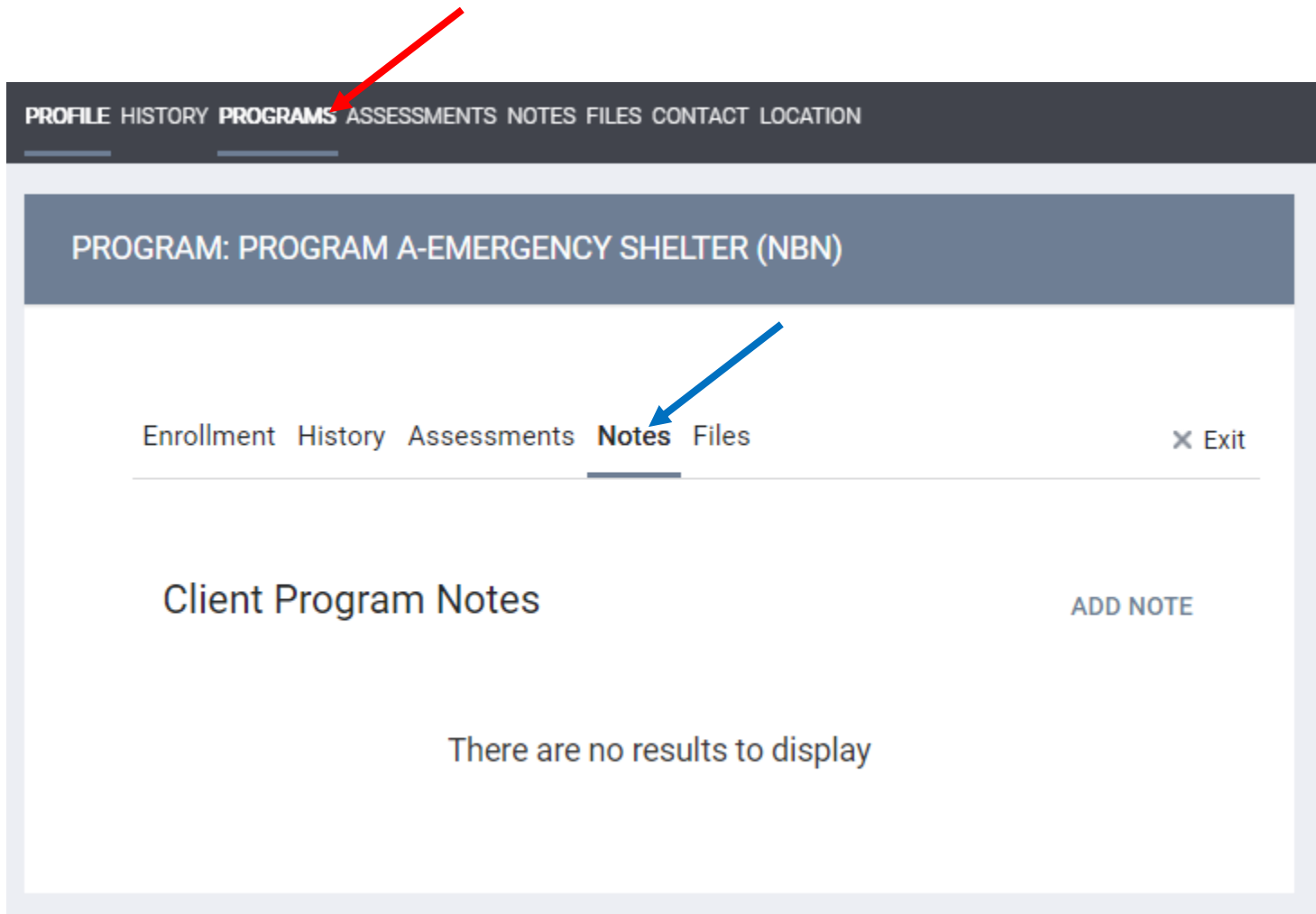
Program Group Members

Member	Date	Status
Spring Kid	03/07/18	Active

Status Assessments 

Client Notes

To create a Client Case Note, go to the **Program** tab (red arrow), select your program, click on **Notes** (blue arrow), and then click **ADD NOTE**. Adding notes this way will be program specific.



The screenshot displays a web interface for client management. At the top, a dark navigation bar contains tabs: PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, and LOCATION. A red arrow points to the 'PROGRAMS' tab. Below this, a blue header bar reads 'PROGRAM: PROGRAM A-EMERGENCY SHELTER (NBN)'. Underneath, a secondary navigation bar includes 'Enrollment', 'History', 'Assessments', 'Notes', and 'Files', with a blue arrow pointing to 'Notes'. An 'X Exit' button is on the right. The main content area shows 'Client Program Notes' with an 'ADD NOTE' button. At the bottom, it states 'There are no results to display'.

Client Notes- Continued

Create a title and enter your note in the body of the notes section. The Agency field will automatically be populated with your agency name.

Time Tracking fields are also available allowing the user to track the time spent on creating the client case note. Utilize the drop-down fields in the *Time Tracking* area to record the number of hours and minutes spent.

Once the Note is completed, click *Add Record* at the bottom of the page.

The screenshot displays a form titled "CLIENT NOTES". The form contains the following fields and options:

- Title:** Goal Discussion
- Agency:** Agency A
- Date:** 01/22/2018 (with a calendar icon) **Time Tracking:** 1 hour (dropdown) and 15 min (dropdown)
- Note:** A text area with a rich text editor toolbar containing **B Bold**, *I Italic*, **Numbers**, and **Bullets**. The note content is: "Had initial discussions today with Zip Adeedoodah to review his personal goals." followed by a bulleted list item: "• Always have a wonderful day."

At the bottom of the form, there are two buttons: **ADD RECORD** and **CANCEL**.

Public Alerts

Public Alerts can be created and appear in the client profile to notify your agency or several agencies of a client situation/need.

Click notes in Client Profile and click on



Under *Public Alerts*, enter Title, Expiration Date, followed by Note explaining the nature of the alert. (Agency field will be automatically entered.)

Selecting the *Private* checkbox will make the Public Alert visible to only staff members to your agency. Not selecting the it will make it visible to all agencies.

Public Alert: This client has been issued system-wide alert. Please review notes for full details. →

After selecting *Add Record*, you can verify that the Public Alert is visible on the client's Profile page.

Big Bird

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

PUBLIC ALERTS

Title

Agency

Expiration Date

Note

B Bold *I Italic* Numbers Bullets

Please ensure that Big Bird and his brother Little Bird are assigned a bed within the same building.

Private

ADD RECORD **CANCEL**

Files and Forms

To access client's Files and Forms, on the Client Profile page, click on the *File* tab (red) in the top menu. Uploading files here will not be program specific. To upload files based on the program the client is in, user must go to the client program and enter the files from there.

Adding a New Client File

To add a new file, select *Add File* link on the top right corner of the File section (blue).

The screenshot displays the client profile interface for Zip Adeedoodah. The top navigation bar includes the client name, a grid icon, an envelope icon, the user name 'Elle Bravo, Agency A', and a profile picture with 'MC'. Below the navigation bar, a menu contains 'PROFILE', 'SERVICES', 'HISTORY', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', and 'LOCATION'. The 'FILES' tab is highlighted with a red arrow. The main content area is divided into two sections: 'CLIENT FILES' and 'CLIENT FORMS'. Each section has an 'ADD FILE +' or 'ADD FORM +' link in the top right corner, with a blue arrow pointing to the 'ADD FILE +' link. Both sections currently display 'There are no results to display'.

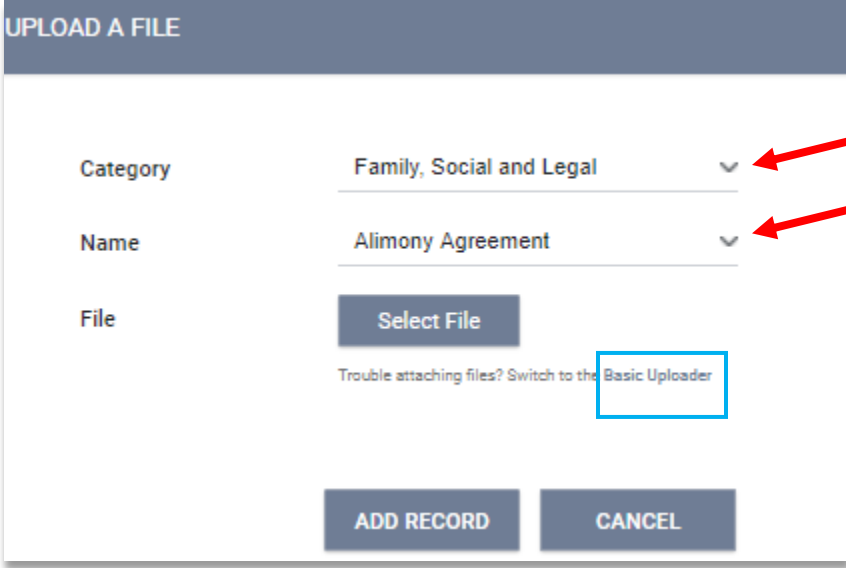
Upload a File

After clicking on the *Add File*, select what *Category* and *Name* that best identify the file you are uploading from the drop down menu (red).

Click on *Select File* to select the file from your personal computer, if the file does not upload, click on *Basic Uploader* (blue).

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.

** Clarity supports all of the most common file types (Word, Excel, PDF, JPG, PNG, etc.)*



The screenshot shows a form titled "UPLOAD A FILE" with the following fields and controls:

- Category:** A dropdown menu with the selected value "Family, Social and Legal". A red arrow points to this dropdown.
- Name:** A dropdown menu with the selected value "Alimony Agreement". A red arrow points to this dropdown.
- File:** A "Select File" button.
- Basic Uploader:** A link labeled "Basic Uploader" with the text "Trouble attaching files? Switch to the" preceding it. This link is highlighted with a blue box.
- Buttons:** "ADD RECORD" and "CANCEL" buttons at the bottom.

Working with Existing Client Files

The File tab provides the following details for each uploaded file:

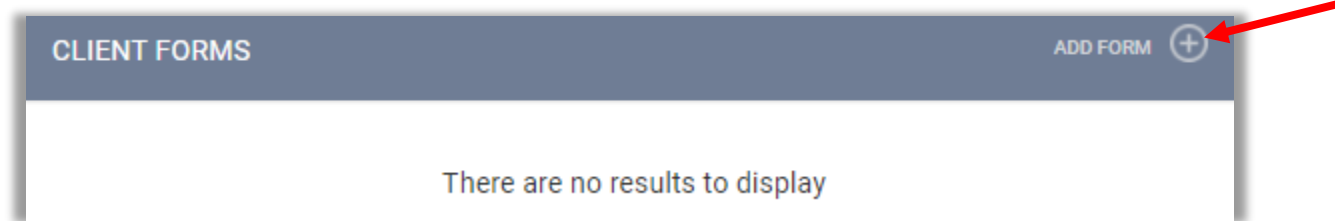
- Category and File Name – selected from drop down menu at the time of upload
- Name of staff member who uploaded the file
- Date of upload
- Size of the file
- Agency associated with the file upload

You can view the existing file by clicking on the icon for the file, or edit the document by uploading a new version via the *Modify file* link (red).



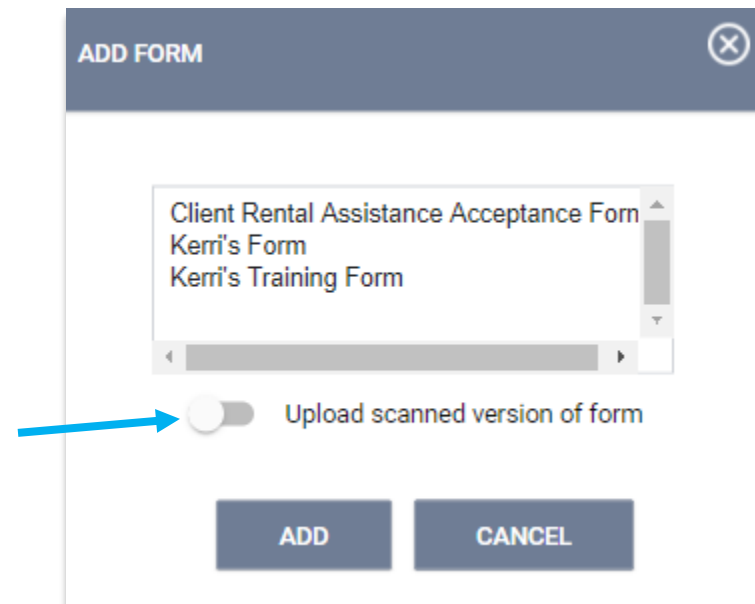
Uploading a Client Form

Click on *Add Form* link right of *Client Forms* (red). A pop up box will appear listing the form options for your particular agency. Click on the desired form.



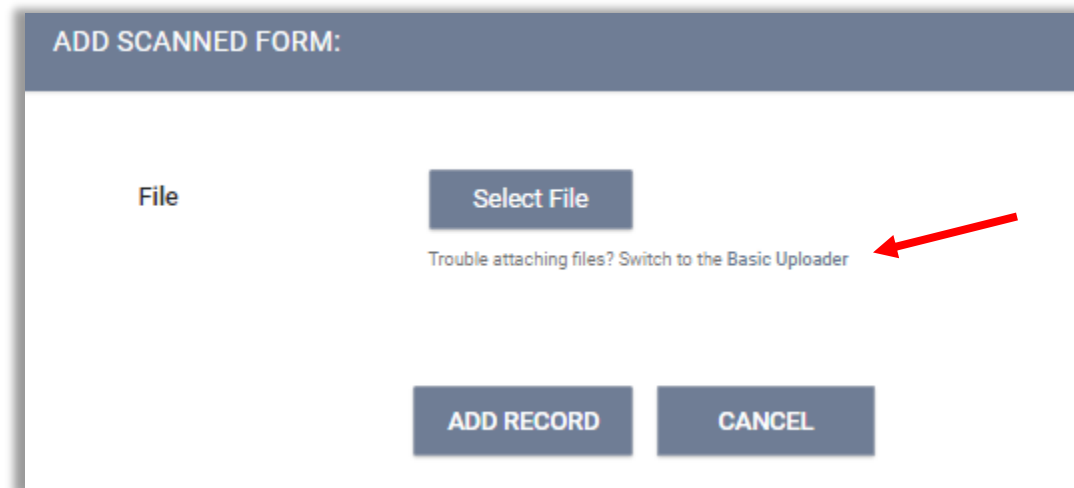
Upload Scanned version of form:

The process for uploading a scanned document is similar to that of uploading a client file. Select *Add Form* and click the toggle box next to *Upload scanned version of form* (blue). Click Add.



Uploading a Client Form- Continued

Add Scanned Form page will appear. *Click on* Select File and select your desired file, then click *Add Record*. If your system is not compatible with advanced upload, you can choose the *Basic Uploader* (*red*).




The screenshot displays a web interface titled "ADD SCANNED FORM:". On the left, the word "File" is positioned. To its right is a dark blue button labeled "Select File". Below this button is a text link: "Trouble attaching files? Switch to the Basic Uploader". A red arrow points from the right side of the image towards this link. At the bottom of the interface are two dark blue buttons: "ADD RECORD" on the left and "CANCEL" on the right.

Reassigning a Case Manager (Assigned Staff)

It is by default that Clarity will assign the user who enrolls the client into the Agency Program as the Case Manager (Assigned Staff).

To change client's Case Manager (Assigned Staff), click on *Programs* under client's name. If the client is already enrolled in a program, this will show in the *Program History*. Hover over the program name and click on the edit icon.

The screenshot shows the client profile for Zip Adeedoodah. The top navigation bar includes PROFILE, SERVICES, HISTORY, PROGRAMS (selected), ASSESSMENTS, NOTES, FILES, and LOCATION. Below this is the PROGRAM HISTORY section, which contains a table with the following data:


Program Name	Start Date	End Date	Type
 NBN ES Agency A	01/03/2018	Active	Individual

An 'Edit' button is located below the program name.


On the right side of the screen in the sidebar- locate the *Assigned Staff* name, click on the edit icon (red) to the right of the name.

A drop down menu will have a list of all the active staff within your agency (green). Choose the new Case Manager (assigned staff) from the list and click *Save Changes*.

The screenshot shows the program details form and the 'CHANGE ASSIGNED STAFF' modal. The program details form includes the following fields:

- 4 DAYS ACTIVE PROGRAM
- Program Type: Individual
- Program Start Date: 12/30/2017
- Assigned Staff: Elle Bravo 
- Head of Household: Zip Adeedoodah

The 'CHANGE ASSIGNED STAFF' modal is open, showing the following options:

- Make Program Private:
- Elle Bravo 

Buttons for 'SAVE CHANGES' and 'CANCEL' are at the bottom of the modal.

Clients History

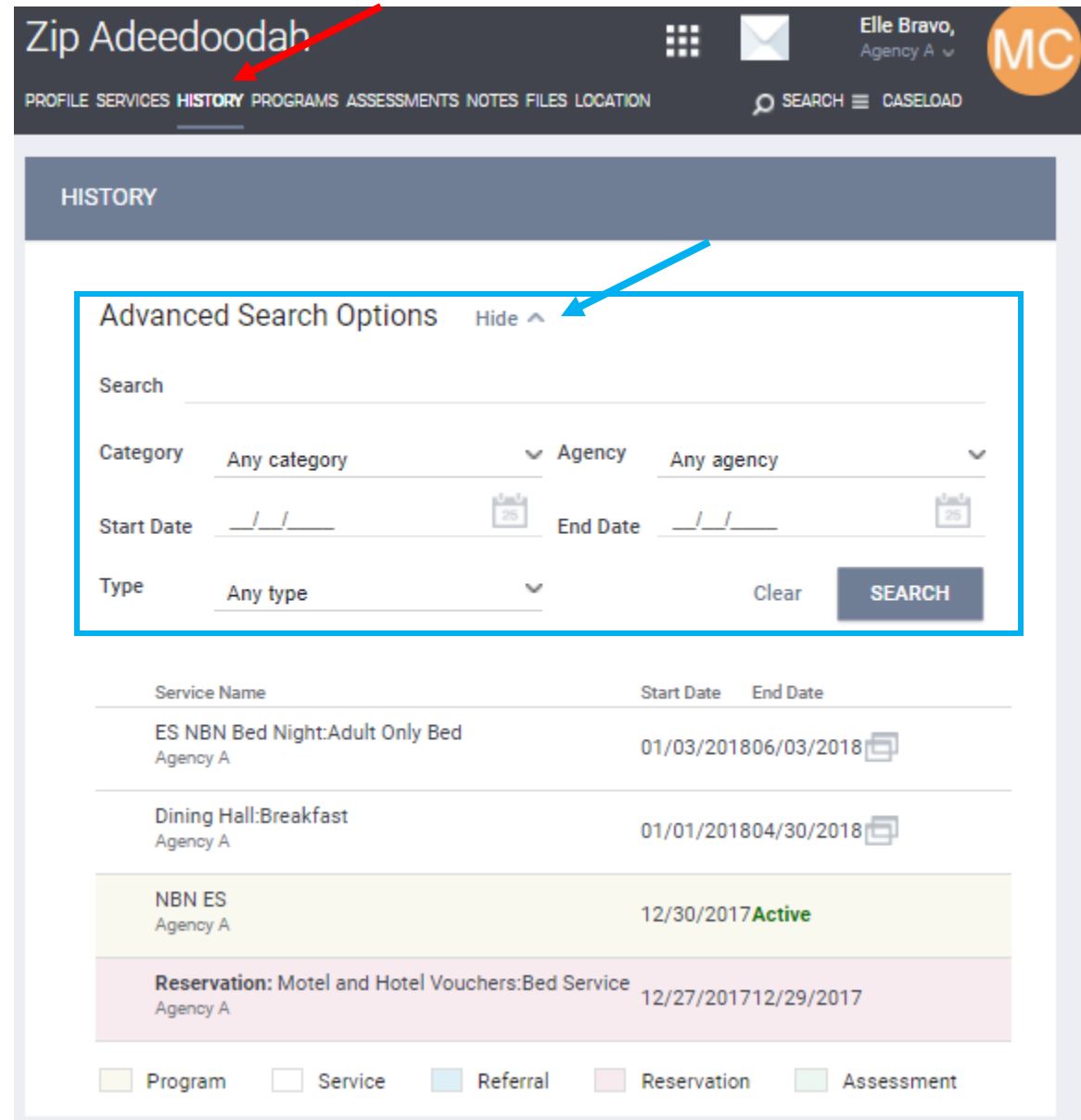
To access client's history, click on the History tab (red) in the Client record.

Advanced Search Tool

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 options allow the following criteria (blue):

- Name – Filter for a keyword within the service title
- Category – Filter for a specific category of service using the convenient drop-down menu
- Agency – Filter for a specific Agency that provided the service
- Date Range – Filter based on a specific date range of service provision



Zip Adeedoodah

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

Elle Bravo, Agency A

MC

SEARCH CASELOAD

HISTORY

Advanced Search Options Hide ^

Search

Category Agency

Start Date End Date

Type Clear

Service Name	Start Date	End Date
ES NBN Bed Night:Adult Only Bed Agency A	01/03/2018	06/03/2018
Dining Hall:Breakfast Agency A	01/01/2018	04/30/2018
NBN ES Agency A	12/30/2017	Active
Reservation: Motel and Hotel Vouchers:Bed Service Agency A	12/27/2017	12/29/2017

Program
 Service
 Referral
 Reservation
 Assessment

History Tab Icons

Dollar Icon :

Service transactions with attached expenses. Includes the date and the expense amount.

Link Icon :

Indicates that there is a referral or a service associated with this entry.

Screens Icon :

Indicates that the service is linked to a Program (i.e. Program-Based Service). If you hover over the screens icon, it will provide you with the Program name, associated agency, date of Program entry, and status (active vs. inactive).













The comment icon :






Indicates that there is a Service Note associated with the service. Mouse-over the icon for more details.

The link icon :

indicates that there is a referral or a service associated with this entry. Mouse-over the icon for more details.

Advanced Search Options View ▾

Service Name	Start Date	End Date
Referral: Kerri's Permanent Supportive Housing System referral to System	11/13/2017	11/13/2017
 Kerri's Permanent Supportive Housing System	11/13/2017	Active 
Dining Hall:Breakfast System	11/13/2017	11/14/2017
Kerri's Awesome Assessment System	11/13/2017	
Bus Pass:One Way System	11/13/2017	11/13/2017  
Job Placement:Job Placement System	11/13/2017	11/13/2017  
Learning Workshop:Resume Writing Class System	11/13/2017	11/13/2017 
Case Management:Individual Session System	11/13/2017	11/13/2017  
Kerri Test Program System	11/10/2017	11/13/2017
Learning Workshop:Life Skills Class System	11/10/2017	11/13/2017 
NBN ES Agency A	07/13/2017	Active
Dining Hall:Breakfast Agency A	07/10/2017	07/16/2017 

 Program
 Service
 Referral
 Reservation
 Assessment

Programs, Services, and Assessments, are color-coded to make them easy to distinguish from one another.

Additional Assistance

For any additional technical assistance

Contact Us:

Website: santacruz.bitfocus.com

Email: santacruz@bitfocus.com

Phone: (831) 713-2288



Help