MyConnectSV

CLARITY HUMAN SERVICES

SANTA CLARA COUNTY

PROVIDER TRAINING GUIDE

JULY 2024 | VERSION 2.4

CONTENTS

ABOUT MyConnectSV

MyConnectSV is the secure **Customer Portal** connected to Clarity Human Services, Santa Clara County's Homeless Management Information System (HMIS). **MyConnect**SV is the local name for this module, but you may also see it referred to as the **Customer Portal** within Clarity Human Services. **MyConnect**SV provides people experiencing homelessness or receiving services or housing with access to components of their HMIS records, tools to communicate with providers, and information and resources to empower them in their journey to permanent housing. Bitfocus developed **MyConnect**SV in partnership with Destination: Home, the County of Santa Clara, and individuals with lived experience of homelessness to address critical concerns identified in the Technology Needs Assessment of the Santa Clara County Supportive Housing System.

Client-Centered Tools

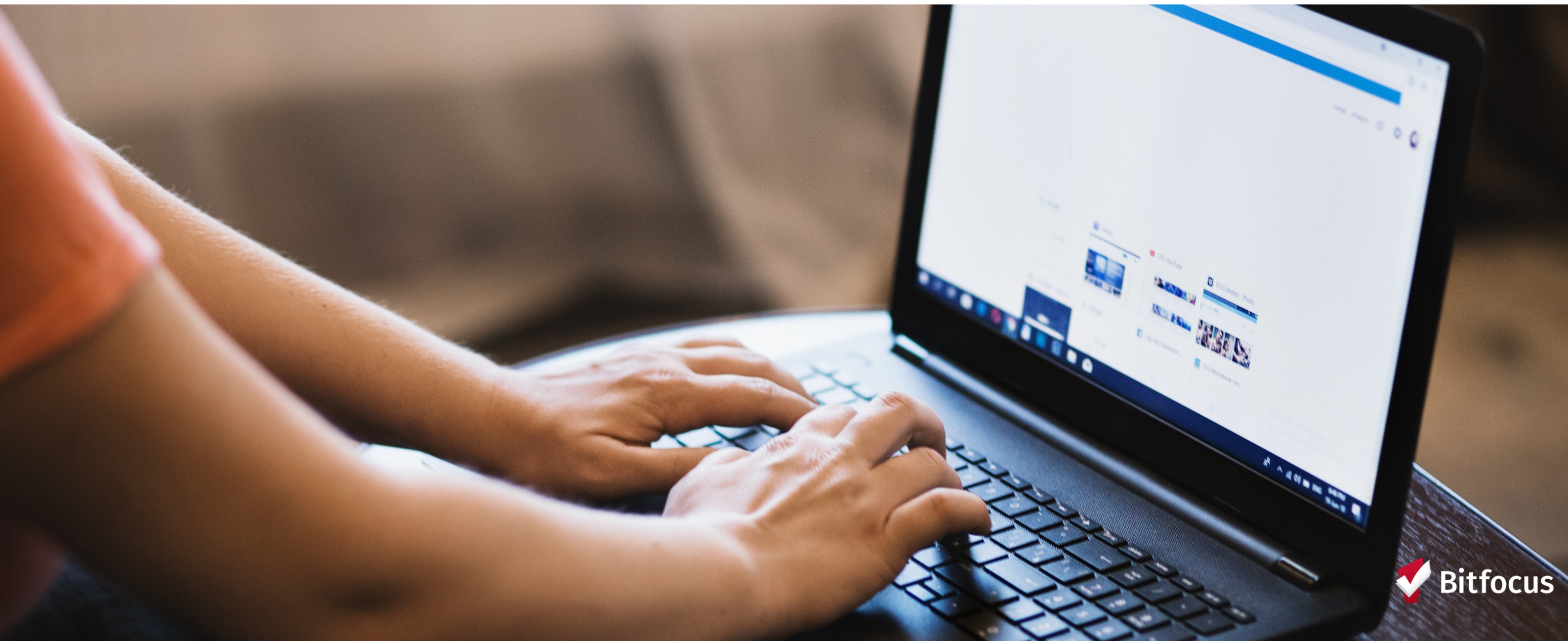
MyConnectSV introduces new client-centered tools designed to support clients in the case management and housing navigation process by increasing access to services and improving communication methods between clients and their care team members. Key features of **MyConnect**SV include a secure message center, the ability to upload documentation, sign new Releases of Information, complete assessments, and more.

Collaborative Approach

MyConnectSV was designed for clients experiencing homelessness with input from individuals with lived experiences of homelessness, including actively homeless individuals. The tools included can also help providers increase coordination with clients and improve the efficiency of the case management process.

Connection to Clarity Human Services

Clarity Human Services is the County of Santa Clara's designated HMIS system. **MyConnect**SV is the Customer Portal module embedded within HMIS that provides clients with access to and the ability to update components of their HMIS record, including their personal contact information, geolocation, and their Release of Information. Providers can request updated information from clients through HMIS, and clients receive and respond to these requests within **MyConnect**SV. When clients complete actions within **MyConnect**SV, such as uploading documentation or completing an assessment, these updates are reflected and accessible on the client record within HMIS in real-time. Many features provide the ability to track client progress all in one centralized location. Providers can also send mass messages and requests to multiple clients at one time, saving you time and energy!



PROVIDER ROLES & RESPONSIBILITIES

Service providers who participate in **MyConnect**SV Program will work closely with client participants. Provider responsibilities include:

Participate in training for MyConnectSV workflow and functionality

Training will be provided for all providers participating in **MyConnect**SV through the Bitfocus Santa Clara County Learning Management System.

Provide training and support to your clients who participate in MyConnectSV

Providers serve as the primary connection between clients and **MyConnect**SV, and providers are responsible for delivering initial training to client participants and offering ongoing support when necessary. Providers will receive training on the client onboarding process, and it is anticipated that **MyConnect**SV training will require 15 to 20 minutes per client.

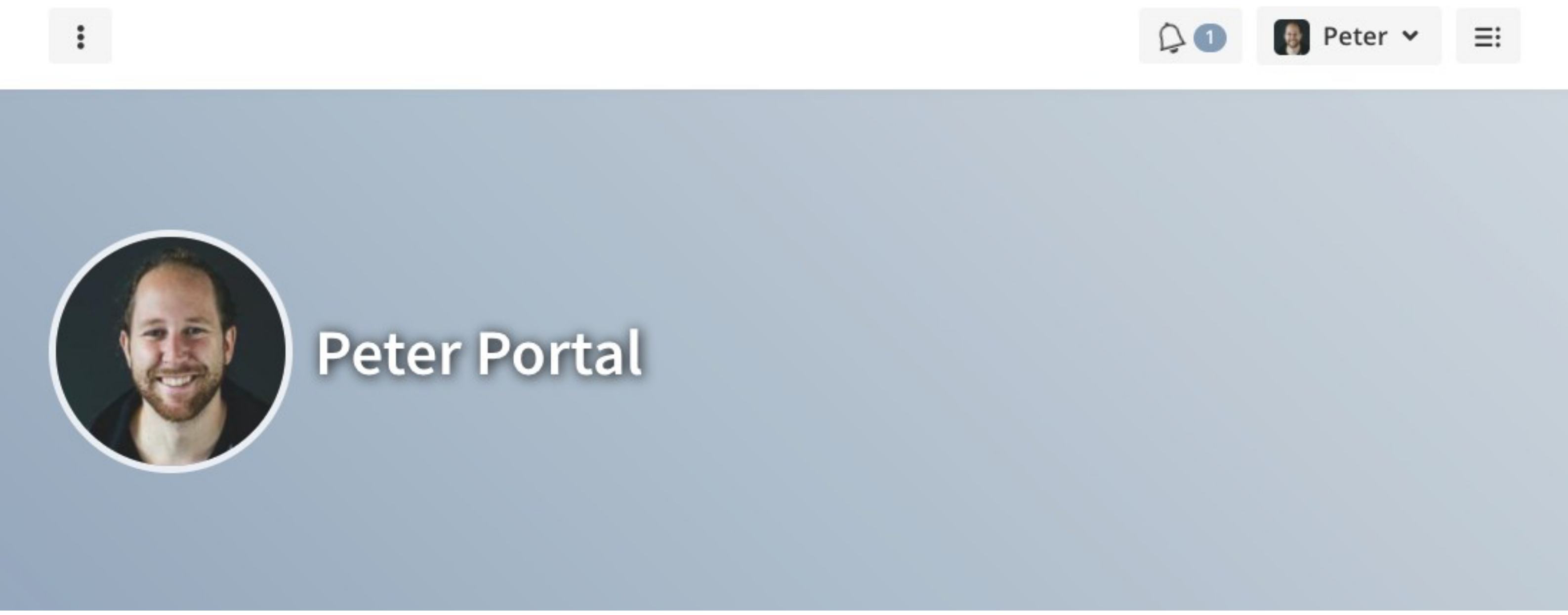
Send MyConnectSV invitation to clients through HMIS

Provider participants are responsible for sending an invitation to clients to participate in **MyConnect**SV. Invitations are sent to the clients via email, and the invitation is initiated through a link on the client's HMIS profile page. This is the first step of the account creation process. We ask providers to invite as many clients to **MyConnect**SV as possible.

Utilize MyConnectSV features within the case management process

Provider participants should use **MyConnect**SV regularly to support clients through the case management process. This guide provides recommended strategies for using **MyConnect**SV, and provider participants will be instrumental in discovering and establishing new use cases to maximize **MyConnect**SV's impact.

ACCOUNT MANAGEMENT



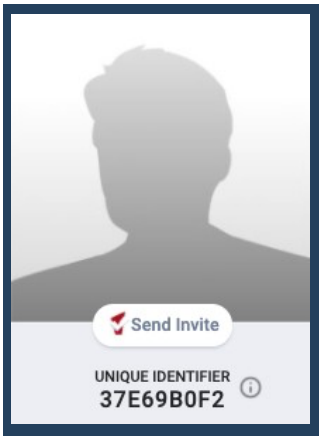
ACCOUNT CREATION: Sending **MyConnect**SV Invitations

The client's account creation process includes multiple steps to ensure the safety and confidentiality of a client's personal information. The process begins with an invitation initiated from HMIS by the service provider to the client. It also requires the client to complete a two-factor authentication process to gain account access. Clients without access to a personal mobile device are still eligible for an account, and additional recommendations are included in the account creation instructions for clients using a shared device.

Sending Invitations to Clients Through Clarity

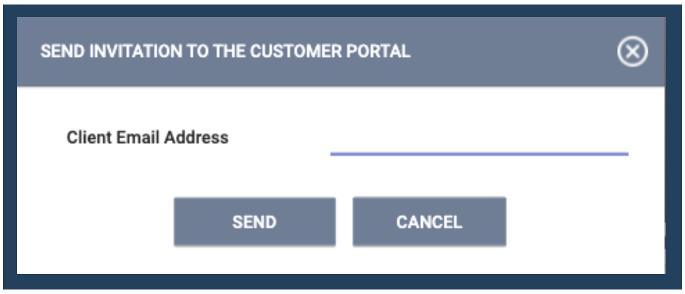
The first step of the account creation process requires a provider to initiate an invitation to join **MyConnect**SV (the **Customer Portal** within Clarity). Client invitations are generated through the following steps:

Navigate to the client profile page in HMIS and click the **Send Invite** button, which is located at the bottom of the client photo section.

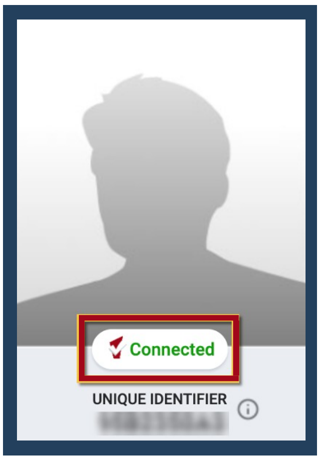


(Note: If you do not see a Send Invite button, the agency may not be configured for **MyConnect**SV Access, and you should contact your system administrator.)

Enter the client email address in the pop-up box and **Send**. **MyConnect**SV invitation button will now say **Invite Sent.**

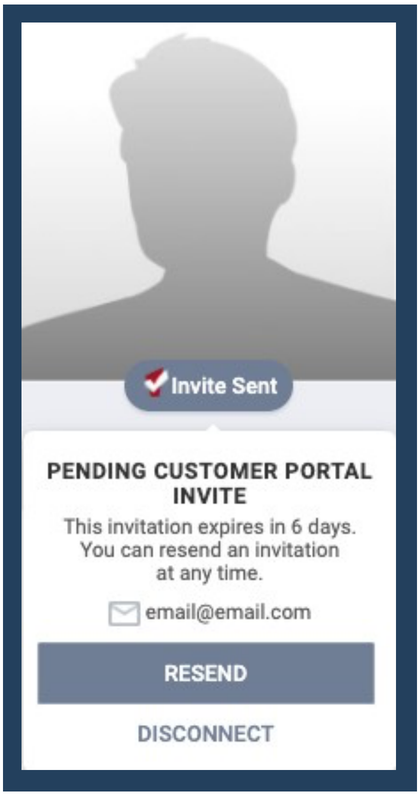


The **Invite Sent** button will change to **Connected** once the client has followed the steps in the next section to create a **MyConnect**SV account. If a client doesn't sign up right away, they'll receive emails reminding them their invitation will be expiring soon. If an account is not created from the invitation email within the number of specified days, the invite will expire and a new invitation email will need to be sent (following the steps outlined above).

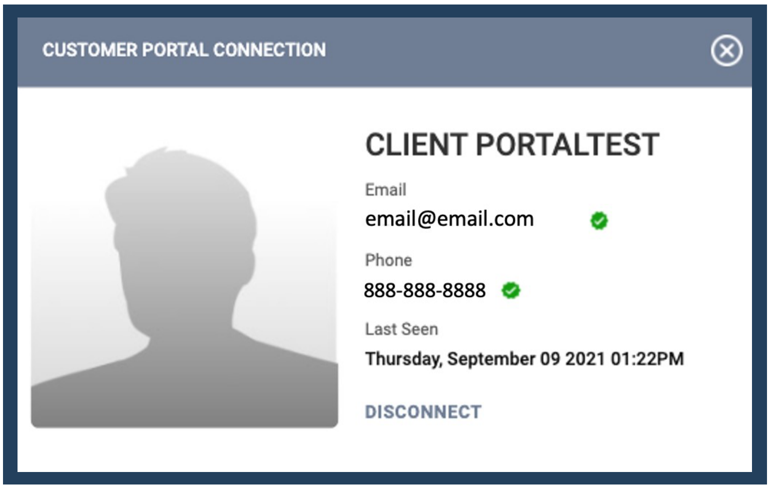


ACCOUNT CREATION: Reviewing Account Status

Invitation Status
Hovering over the **Invite Sent** button will display the number of days to invitation expiration, the email address the invite was sent to, and the options to manually Resend or Disconnect the invite.



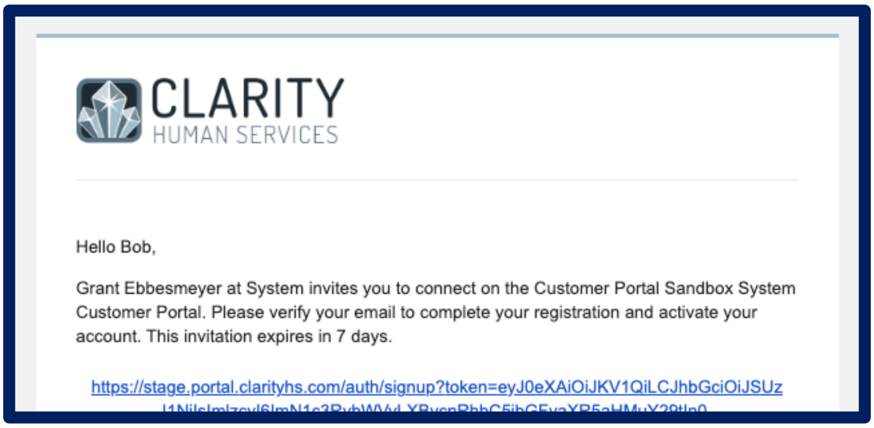
Account Status for Active Accounts
Once the client has created their account, clicking on the **Connected** button will display a summary of **MyConnect**SV account information including the email address and phone number associated with **MyConnect**SV account as well as a Last Seen date and time for when **MyConnect**SV account was most recently accessed by the client. This is a useful reference for when a client reaches out for support accessing their account

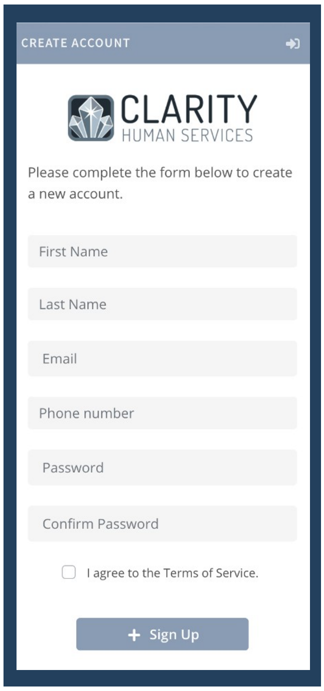


ACCOUNT CREATION: Client Instructions

Client Email Invitation

After a provider sends an invitation to join **MyConnect**SV, the client will receive an invitation from noreply@bitfocus.com titled "Clarity Human Services - Customer Portal Invitation." Clicking the link will direct the client to the **MyConnect**SV site to register an account.





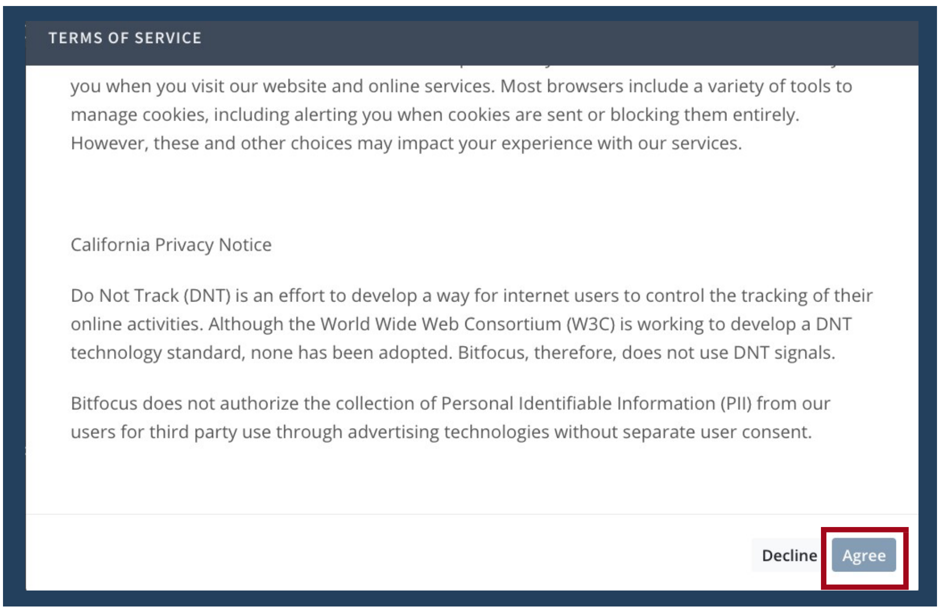
Client Credentials

The client enters their first name, last name, email address, mobile phone number, and password to start registration. The email address will be the username. Info bubbles appear to provide additional information about field requirements.

The password must be at least 8 characters ling and contain at least one special character, one upper case letter, and one lower case letter.

Terms of Service

The client will need to click **I Agree to the Terms of Service** to review the site agreement. When the Terms of Service appear, they will need to scroll to the bottom of the Terms to click the **Agree** button. Agreeing to the Terms of Service is required to access **MyConnect**SV.



ACCOUNT LOGIN: Client Instructions

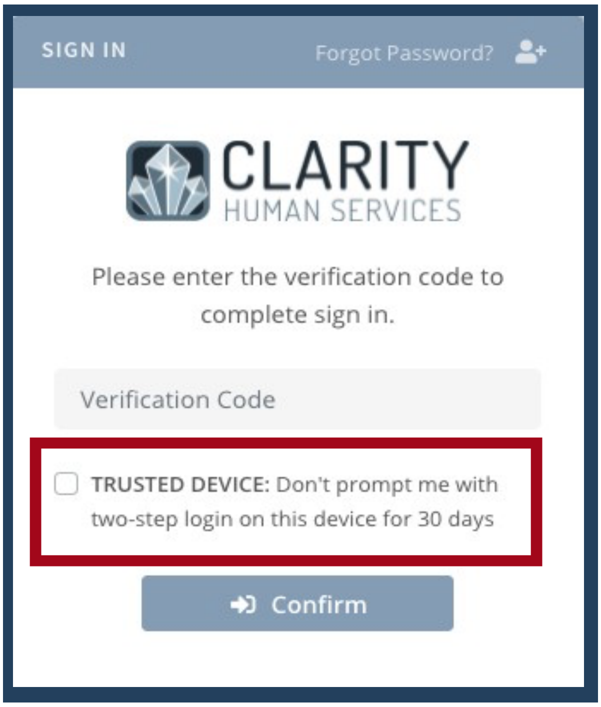
To log into their MyConnectSV account at any time, clients should visit the following web address:

portal.clarityhs.com

Encourage the client to write this address down or save it in their device's bookmarks to ensure it's not lost.

Authentication Process

MyConnectSV is secured with multi-factor authentication. This means that in addition to entering the password, the system will send a verification code to the email address used at account creation. The code sent to the client's email must be entered into the login screen to access the account. After authentication is complete, the account will be made active.

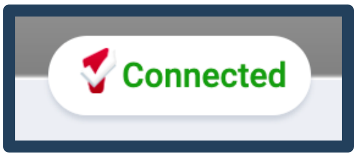


There is an option to mark a trusted device to limit the need to enter a code from each log in to once every 30 days. **It is advised not to mark a public or shared device as trusted to protect your personal information and security.** Enter the code and click **Confirm**. This completes the log- in process, and you will be directed to your **MyConnect**SV dashboard.

Trusted Device

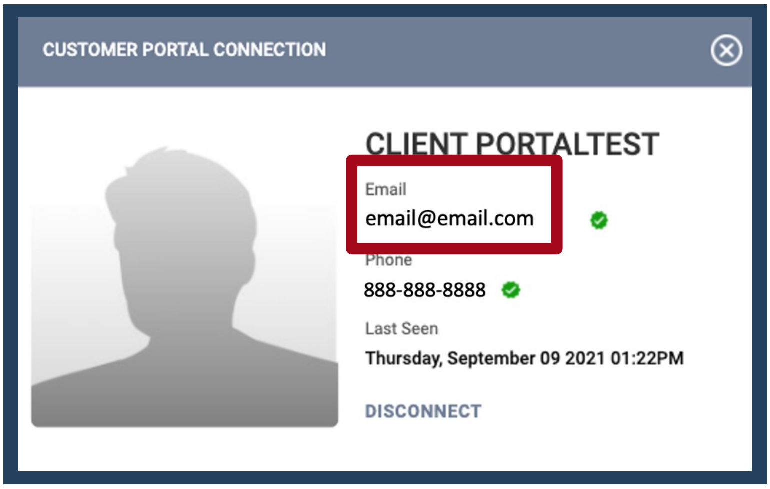
TROUBLESHOOTING LOGIN ISSUES

If a participant reports that they are having difficulty logging into their MyConnectSV account, you can start by trying the following:



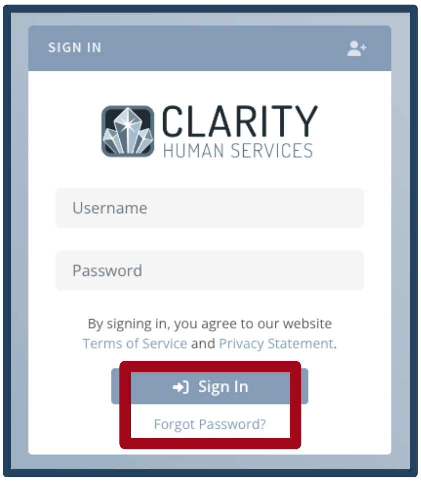
Navigate to the client's profile in Clarity and confirm they have a **Connected** icon above their unique identifier.

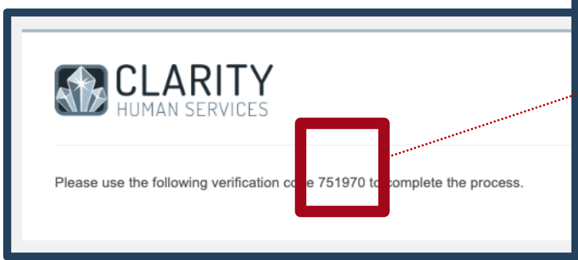
Clicking on the **Connected** button will display a summary of **MyConnect**SV account information including the **email address** associated with the **MyConnect**SV account. Confirm they are using this exact email address to log in. If they need to change their email address, click **Disconnect** and send a new invitation to their new email address.

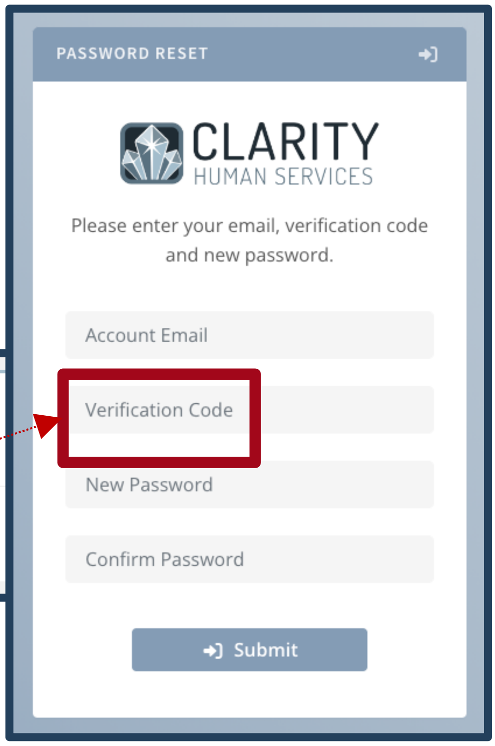


Resetting Account Password

If a client forgets their **MyConnect**SV password, they can easily reset it by visiting **portal.clarityhs.com** and clicking the "Forgot Password?" link under "Sign In." On the next screen, enter the email address connected to the **MyConnect**SV account; the client will receive an email with a verification code, which they will enter on the next screen and set a new password.







If a participant with an active **MyConnect**SV account is still having login issues after attempting these steps, providers can submit a support request for our team to investigate further by emailing sccsupport@bitfocus.com. Please do not have participants contact Bitfocus for support directly.

ACCOUNT DISCONNECTION: Provider Instructions

Account disconnection options are available for providers and clients. Reasons for account disconnection may include loss of access to the email address associated with their account, potential security breach, or client desire to suspend access. The client account will still exist, but the client will not be able to access any account information after the disconnection is complete.

Reasons for Account Suspension

There are a variety of reasons a client's **MyConnect**SV account may need to be disconnected:

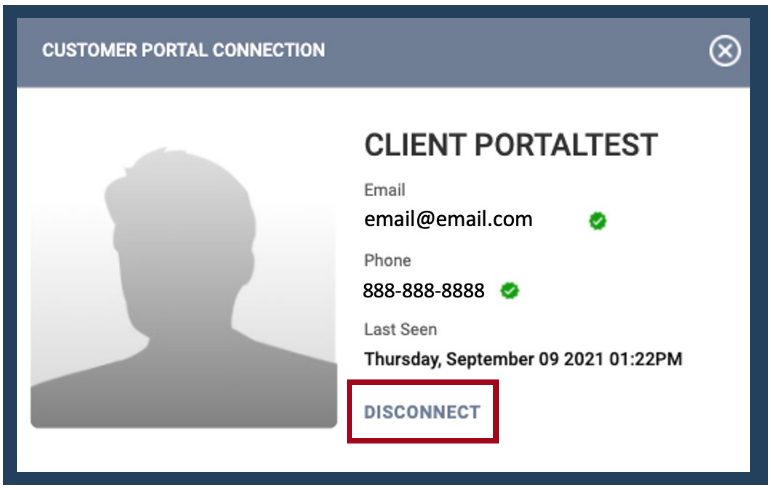
- Updated Client Email Account
  If a client updates their email address or loses access to the email address connected to **MyConnect**SV, providers will need to take steps to disconnect the current account and send a new **MyConnect**SV invitation to an updated email address.

- Client Request to Suspend
  A client may request to disconnect their account verbally or in writing. Providers are encouraged to respond to the request as soon as possible.

- **MyConnect**SV Account Security Breach
  If there is concern that a client's MyConnectSV **account has been compromised, their account should be immediately disconnected** and the system administrator should be notified.

Instructions for Account Disconnection

Navigate to the client profile page and click the Connected/Invite Sent button, which is located at the bottom of the client photo section. Click **Disconnect**, the button display under the client profile picture will change to **Send Invite**, indicating there is no longer a connection between the Clarity profile and **MyConnect**SV. (*Note: After a disconnection, if a client uses the email to log into **MyConnect**SV, the dashboard and navigation panel will not display any Clarity information.)*



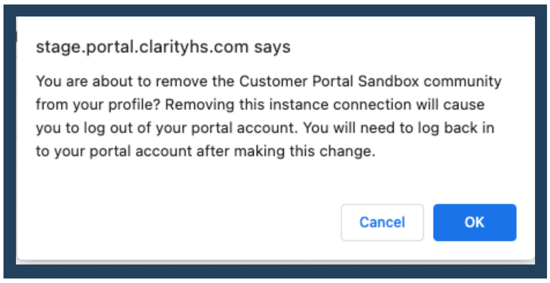
After the account is disconnected, an invite to a new email address can be sent. The client record is stored in the Clarity database, so when a new email address **MyConnect**SV account is connected, historical information from the previous account will be available.

ACCOUNT DISCONNECTION: Client Instructions

Within **MyConnect**SV, clients have the option to disconnect their **MyConnect**SV account. If they opt to disconnect their account, all information will be removed from their **MyConnect**SV account. If clients log back into their account after disconnect, they will only have access to view the **MyConnect**SV dashboard and the profile settings.

Instructions for Account Disconnection

Navigate to the client profile page within **MyConnect**SV. Under the Community Management settings, clients will see the option to disconnect their account. To disconnect, clients should click the red trash can icon appearing next to the instance name. When the client selects the trash can icon, they will receive a warning notice confirming account disconnection.

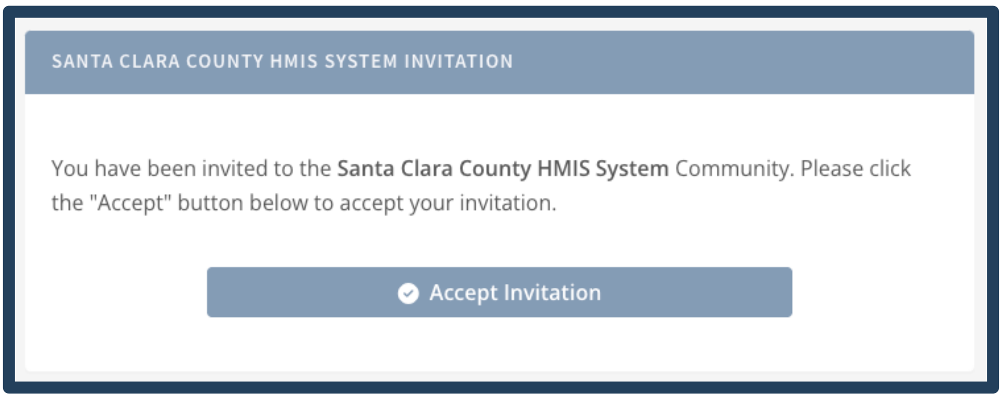


Instructions for Account Reconnection

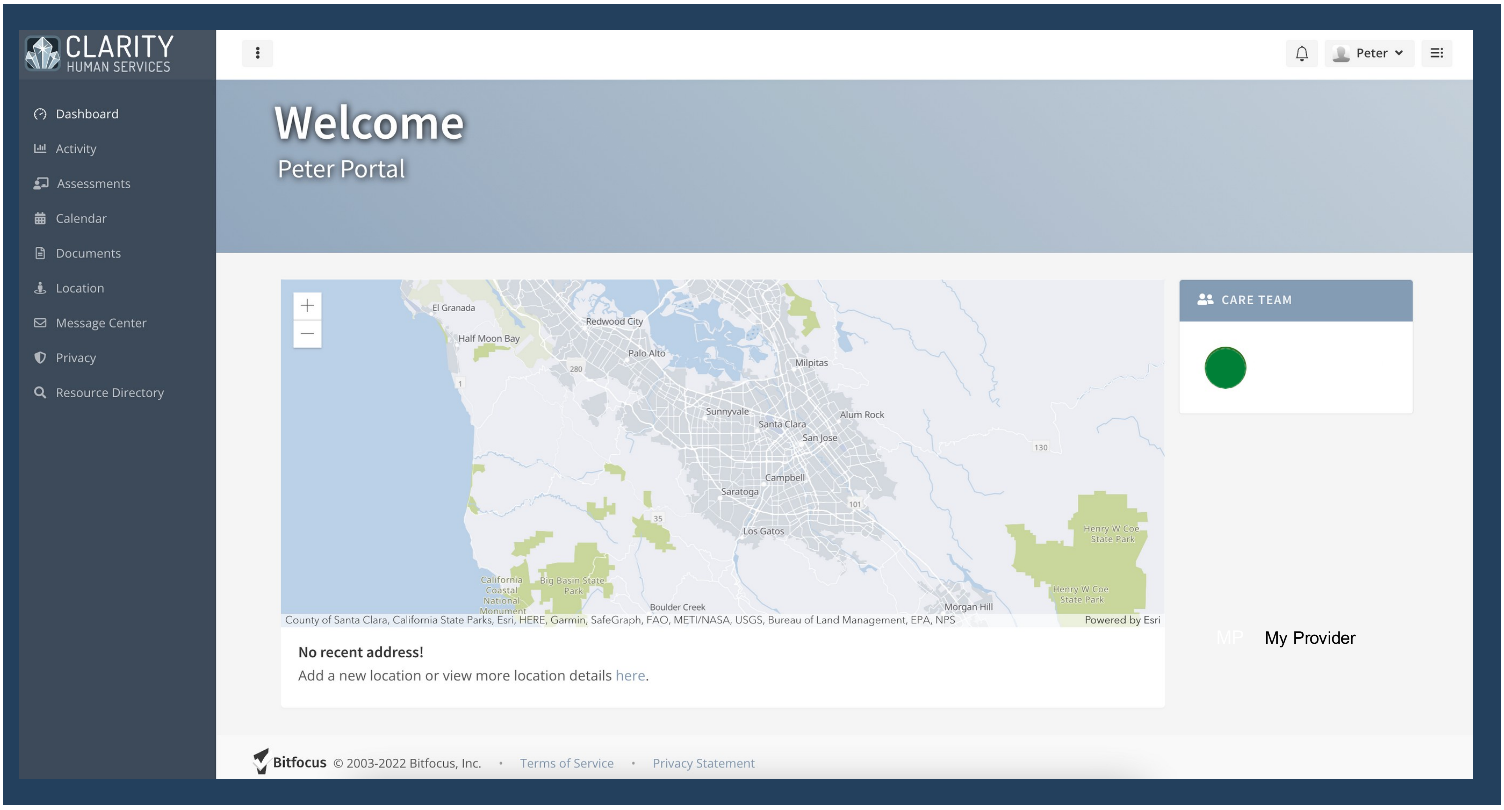
If a client wishes to reconnect their account, it will require a new invitation from a service provider. After a provider sends the new invitation, the client will receive an invitation from noreply@bitfocus.com titled "Clarity Human Services - Customer Portal Invitation."

If the client has provided the same email that they previously used to connect to **MyConnect**SV, they will be taken directly to the **MyConnect**SV login page. They can then utilize the **same email and password** they previously used to login to their **MyConnect**SV account. If they have forgotten their password, they can easily reset it by clicking the "Forgot Password?" link under "Sign In." After clicking "Forgot Password?", enter the email address connected to the MyConnectSV account; the client will receive an email with a verification code, which they will enter on the next screen and set a new password.

After logging into their **MyConnect**SV account, the client should press "Accept Invitation" to reconnect their



NAVIGATION


CLARITY
HUMAN SERVICES
Dashboard
Activity
Assessments
Calendar
Documents
Location
Message Center
Privacy
Resource Directory
Peter
Welcome
Peter Portal
CARE TEAM
My Provider
No recent address!
Add a new location or view more location details here.
County of Santa Clara, California State Parks, Esri, HERE, Garmin, SafeGraph, FAO, METI/NASA, USGS, Bureau of Land Management, EPA, NPS
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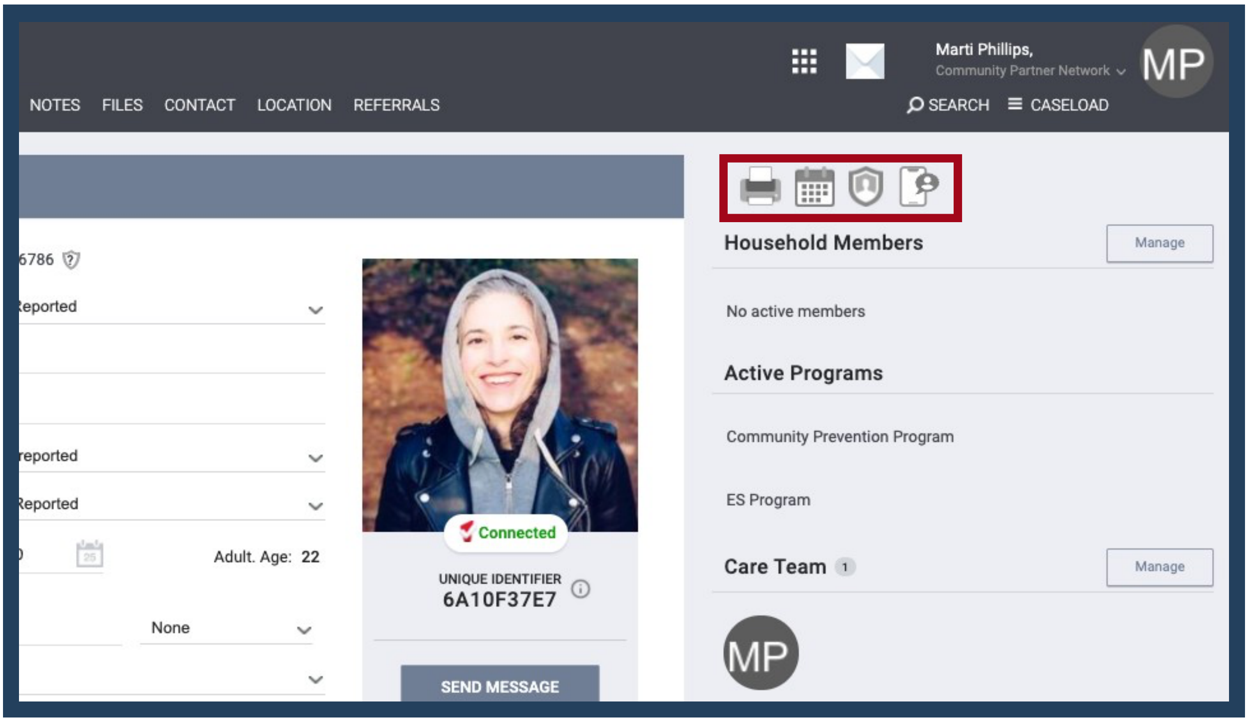
NAVIGATION: Provider Instructions

MyConnectSV is a module of Clarity Human Services and information is easily integrated and exchanged between **MyConnect**SV and HMIS. Providers can issue **MyConnect**SV requests to individual clients through the client profile in HMIS, as well as send mass requests or messages to multiple clients at one time.

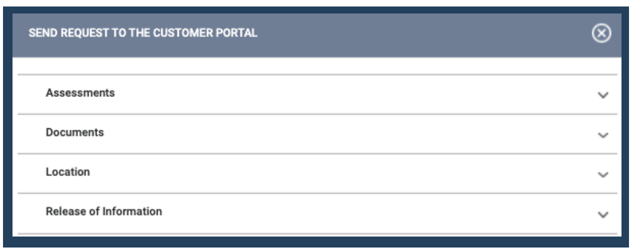
Individual MyConnectSV Requests

MyConnectSV Requests are managed through **Customer Portal** screen which is accessed through **the Customer Portal** icon in the client's HMIS profile. The icon only displays if a client has an active **MyConnect**SV account. Some **MyConnect**SV requests, such as assessments, can also be initiated through a program enrollment.



Send & Manage Individual Client Requests

Send new **MyConnect**SV requests by clicking **the Customer Portal** icon and **Send New Request** in the **Customer Portal** screen. A pop-up window will display with request options. Use the dropdown to send the desired request to the client. There are some limitations to how many requests can be sent for the same information. Requests and their status can be viewed in the Request History. Providers are able to cancel pending requests by clicking the **Cancel** button next to the request.

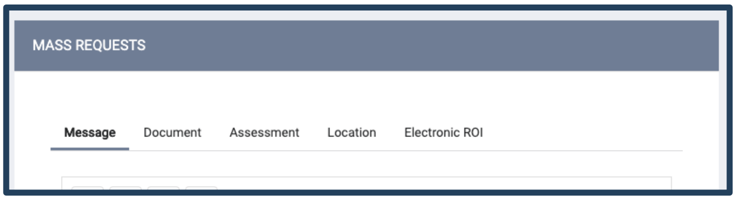


NAVIGATION: Provider Instructions

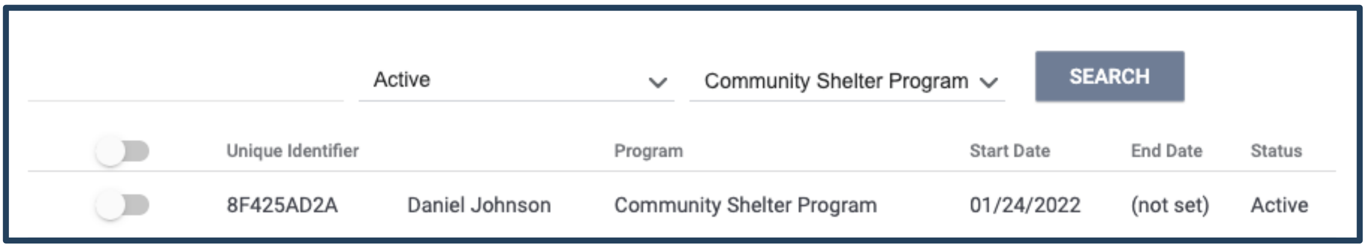
Mass MyConnect SV Requests

MyConnectSV requests or messages to multiple clients at one time are managed through the **Mass Sending** functionality, which is accessed through the **navigation pad**.

After clicking **Mass Sending**, choose either Message or the type of mass request you'd like to send (Document, Assessment, Location, or Electronic ROI). Details on specific types of requests are included in the next section (Feature Review).

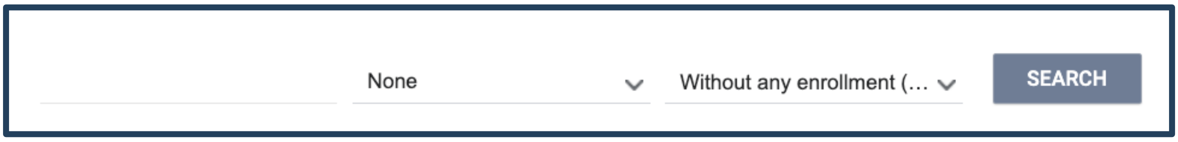


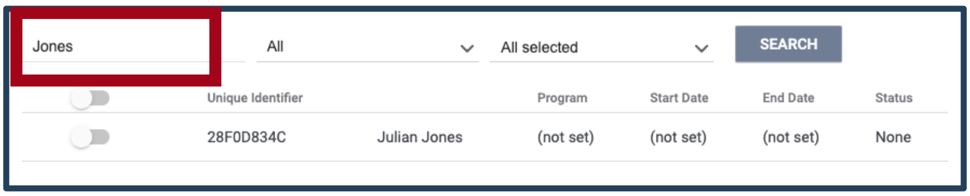
Use the dropdowns under the request information section to find a list of clients with MyConnectSV Portal accounts who currently have an **Active** program enrollment (not exited) or **Inactive** program enrollment (previously were enrolled but exited) in the **selected program(s)** within your agency.



Click SEARCH to get a list of clients with MyConnectSV accounts who are currently active in the Community Shelter Program.

Alternatively, to find clients who are *not* currently or previously enrolled in programs in your agency select **None** and **Without any enrollment**:

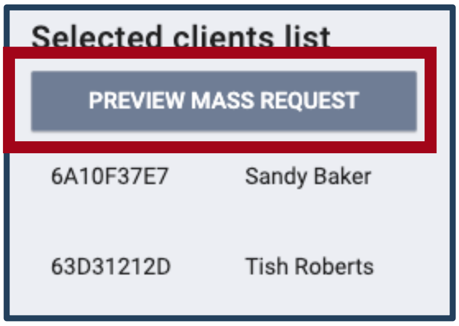




You can also use the text box to **search for a specific client** by name:

Click SEARCH to get a list of clients with MyConnectSV accounts who have never been enrolled in programs in your agency.

Click the top toggle button to add all clients in the current list to the **Selected clients list** in the right pane, or add and remove individual clients by clicking the toggle next to their name:



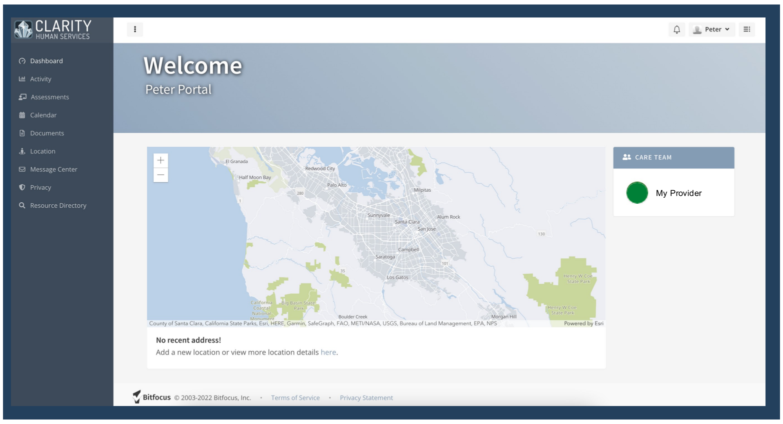
Click **Preview Mass Request** in the right pane to review and send your message or request.

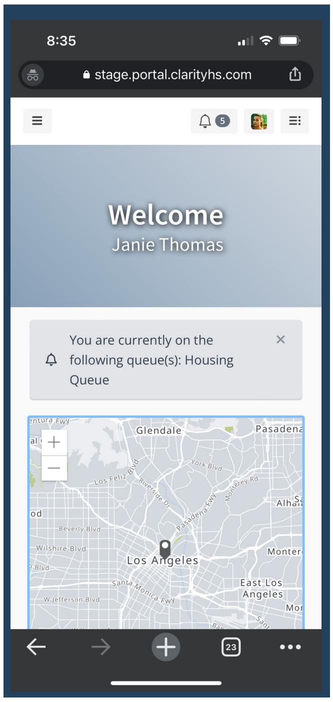
NAVIGATION & PROFILE: Client Instructions

MyConnectSV navigation defines how clients move between the various **MyConnect**SV features. Navigation within **MyConnect**SV is designed to be intuitive and user-friendly.

Dashboard

Upon logging in, clients will land on their personal Dashboard area of **MyConnect**SV. Additional information about the Dashboard is available in the feature review section of this guide.



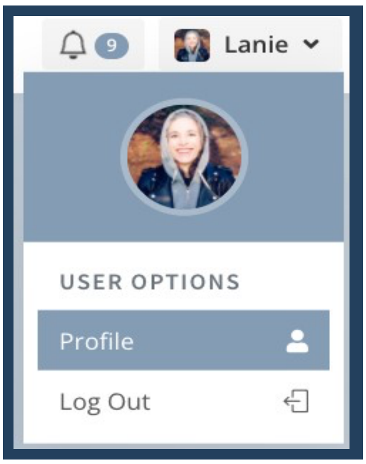


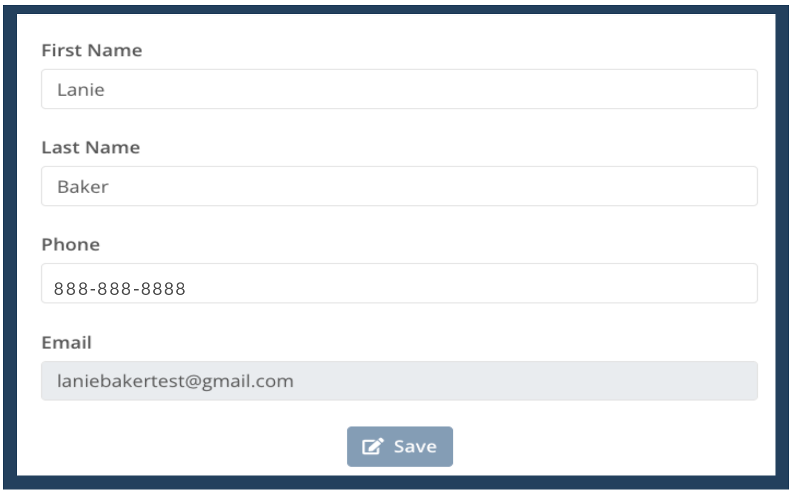
Client Profile

The client profile is accessed through the drop-down in the upper right-hand corner of **MyConnect**SV. Clients are able to update their personal information including their name, phone number. The Client Profile also includes Password Settings, Account Preferences, and Community Management.

Profile Information

When a client updates their contact information, the new information is made available to providers in the Contact tab of Clarity. **MyConnect**SV submitted contact information is indicated with the contact type "Client Supplied".

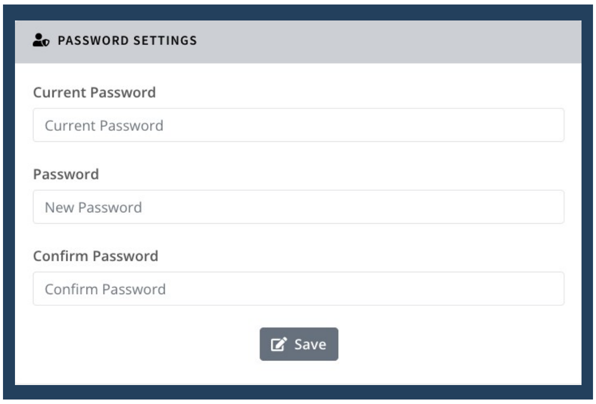




NAVIGATION & PROFILE: Client Instructions

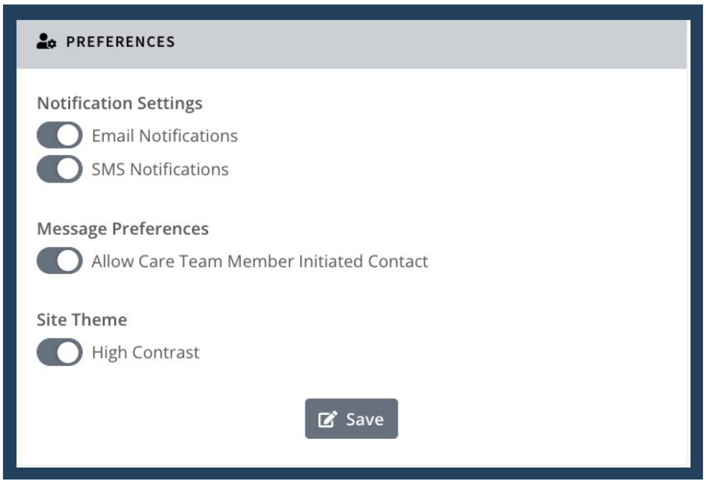
Password Settings

Clients can easily update their Customer **MyConnect**SV password in the Password Settings options located within the Client Profile. To generate a new password, the current password is required.



Account Preferences

The Account Preferences settings allow clients to select their notification preferences, message preferences, and site theme.



Notification Settings

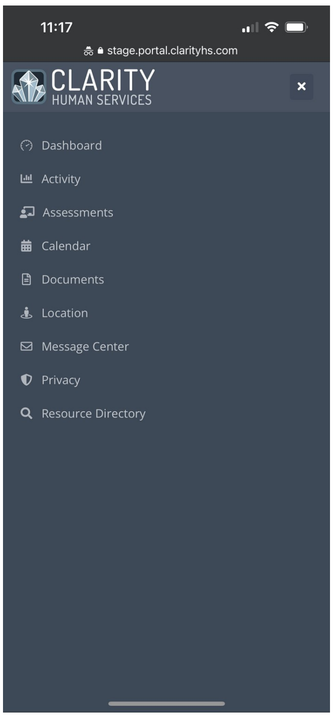
The Notification Settings allow clients to select to receive an email notification, text message, or both whenever a provider requests information, schedules an appointment or sends a message. It is recommended that clients leave at least one of these settings enabled.

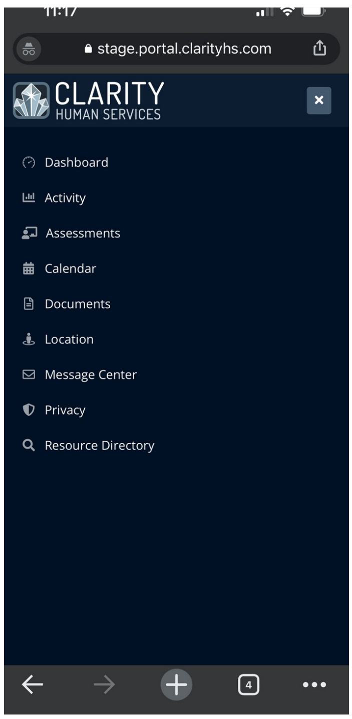
Message Preferences

The Message Preference settings allow clients to disable care team member initiated messages. By default, this setting is turned on. If a client disables care team member initiated contact, it will prevent all care team members from sending messages.

Site Theme

The Site Theme setting allows users to select a High Contrast Site theme which converts their view of MyConnectSV to a higher contrast. This setting may be easier to view for some clients.

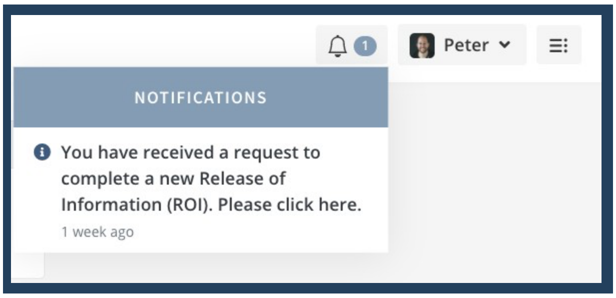




Community Management

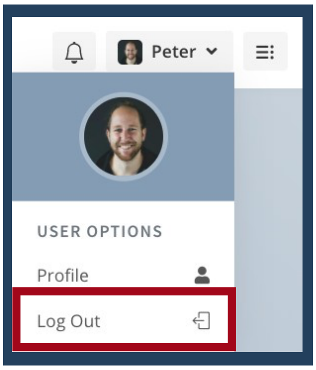
The Community Management setting allows clients to disconnect their Custom **MyConnect**SV Account. Account Disconnection will suspend the client's access to their Customer **MyConnect**SV data but not delete the account. Refer to page 10 for more information.

NAVIGATION & PROFILE: Client Instructions



Client Notifications

Clients will receive a notification upon login alerting them to any new provider requests. Notifications are resolved once a client clicks on it and is directed to the page. The notification banners at the top of each page will remain for ROIs, documentation requests, and assessments until the requested item is completed. Notifications can also be reviewed in the right-side panel of **MyConnect**SV



Log Out

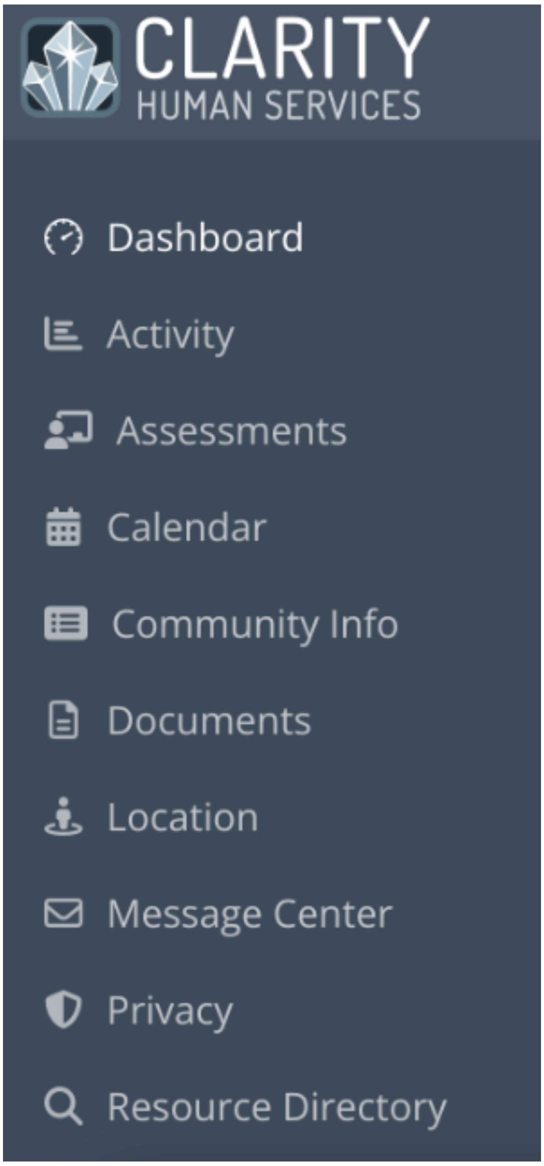
Clients can log out of **MyConnect**SV through the user options dropdown. **Remind clients to log out at the conclusion of each session especially when using a shared device.** Clients will be automatically logged out after 20 minutes of inactivity, and a warning will display two minutes before the automated logout occurs.

Use Case & Promising Practices

MyConnectSV is designed to be easy and intuitive to navigate.

- Encourage clients to spend time exploring the client Dashboard, Profile, and Navigation Pane.
- Encourage clients to review their **MyConnect**SV Profile for accuracy and update their contact information any time changes occur.
- Encourage clients to leave the Notification Settings enabled for email notifications and SMS notifications.
- Encourage clients to leave care team member-initiated contact enabled so they can receive messages and updates from their care team members at any time.

FEATURE REVIEW

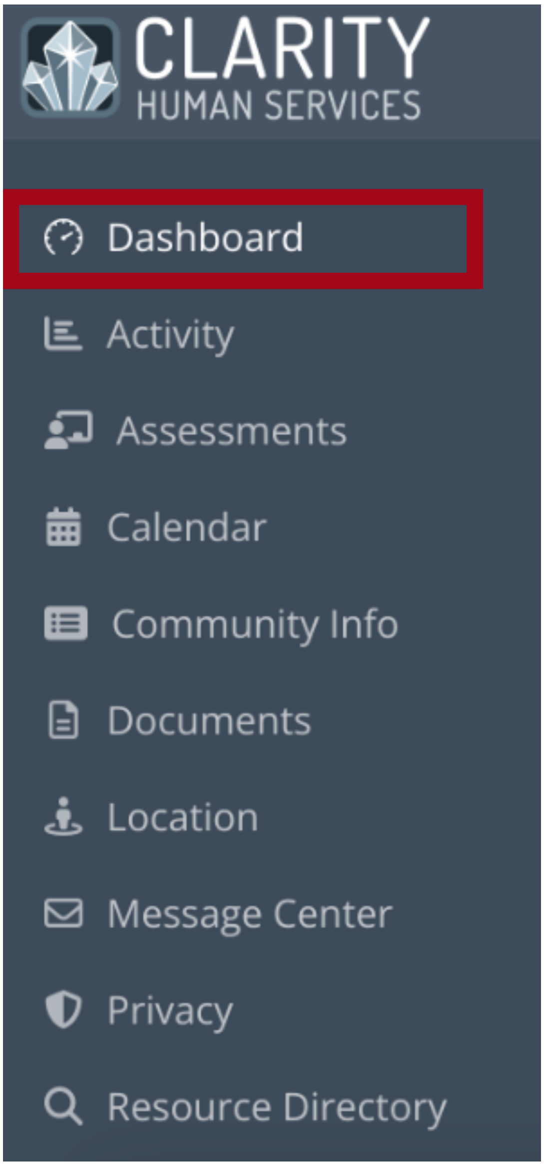


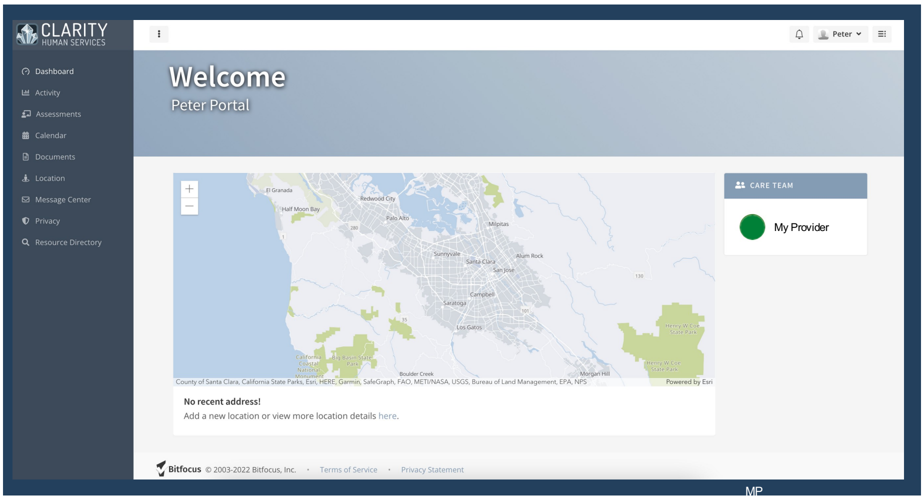
The next section of the **MyConnect**SV Provider Training Manual contains instructions on aech of the features currently available through **MyConnect**SV. Each subsection includes feature details, user instructions for service providers and clients, and information on use cases and promising practices for each of the features

Dashboard
Activity
Assessments
Calendar
Documents
Location
Message Center
Privacy
Community Info & Resource Directory

DASHBOARD

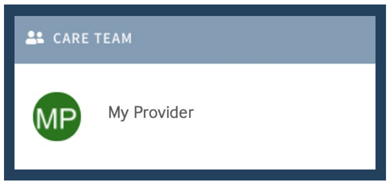
The Dashboard is the default screen when the client logs into **MyConnect**SV and displays the client's most recent location, community queue status, care team assignments, and upcoming appointments.





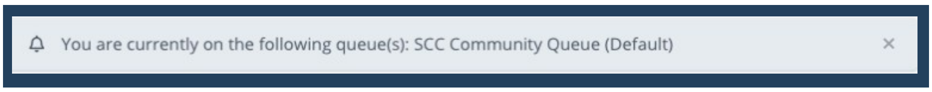
Care Team

The client’s care team members are displayed in the care team information box. Care team members must be assigned to the client in Clarity to display on **MyConnect**SV dashboard.



Community Queue Status

If a client has an active referral on a Community Queue or a pending or in-process referral to a program from the Queue, a banner will display on the dashboard. No additional functionality or information is available outside of the status

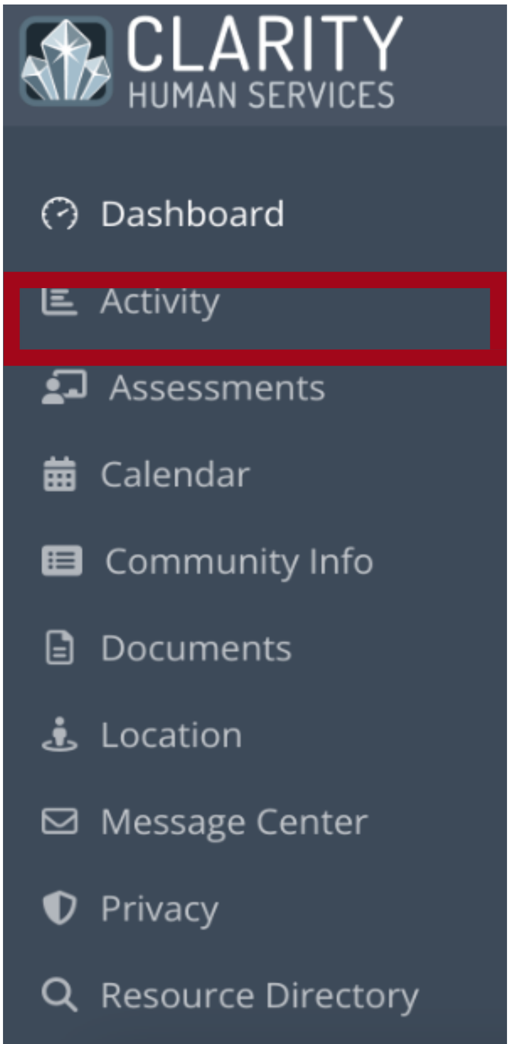


Upcoming Appointments

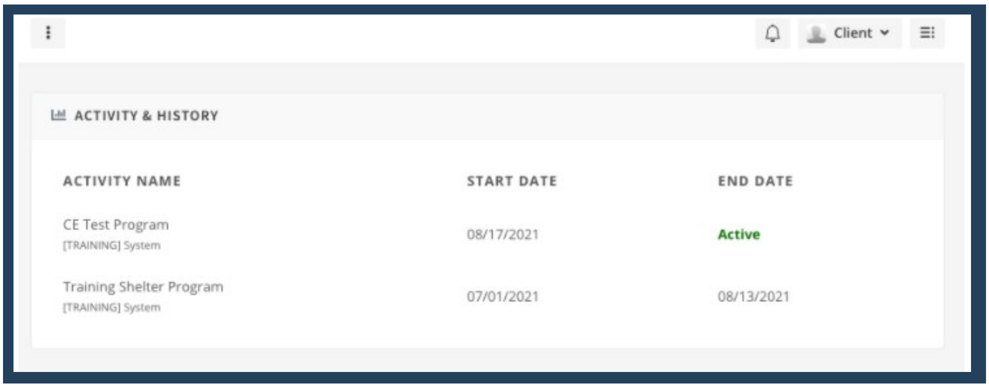
Upcoming provider appointments are displayed in the appointment information box. More information on appointments is available in the Calendar section of this guide.

ACTIVITY & HISTORY

Activity & History provides clients with a chronological listing of project enrollments, including agency name, program name, participation start date, and participation end date. A green active icon is displayed for any active enrollments, and new enrollment data is available in the client view of **MyConnect**SV in real-time. Any group or family enrollments will include an icon with the count of members enrolled.
The client view does not include access to project enrollment or exit records, assessments, service history, or provider notes.



How to View Activity & History
Under the client view of **MyConnect**SV**,** the Activity tab includes a display of program enrollment and exit data. No additional actions are available to clients in the Activity tab. There are no required actions or instructions for providers to use this feature.



Use Case & Promising Practices

The Activity & History feature allows clients to review their program participation history for accuracy and reference purposes.

Explain to clients how you and other providers might use this information: For example, previous and current program participation history might be used to understand a client's past program involvement or to determine eligibility for future programs.

Explain to clients how they might use this information: Encourage clients to review Activity & History data to ensure accuracy. Request clients to review start and end dates with attention to any active enrollments. Clients should reach out to their provider if they identify discrepancies or have questions about their service history.

Explain that enrollment data is available in real-time. Clients can view new program enrollments or exits immediately after providers complete the actions within HMIS.

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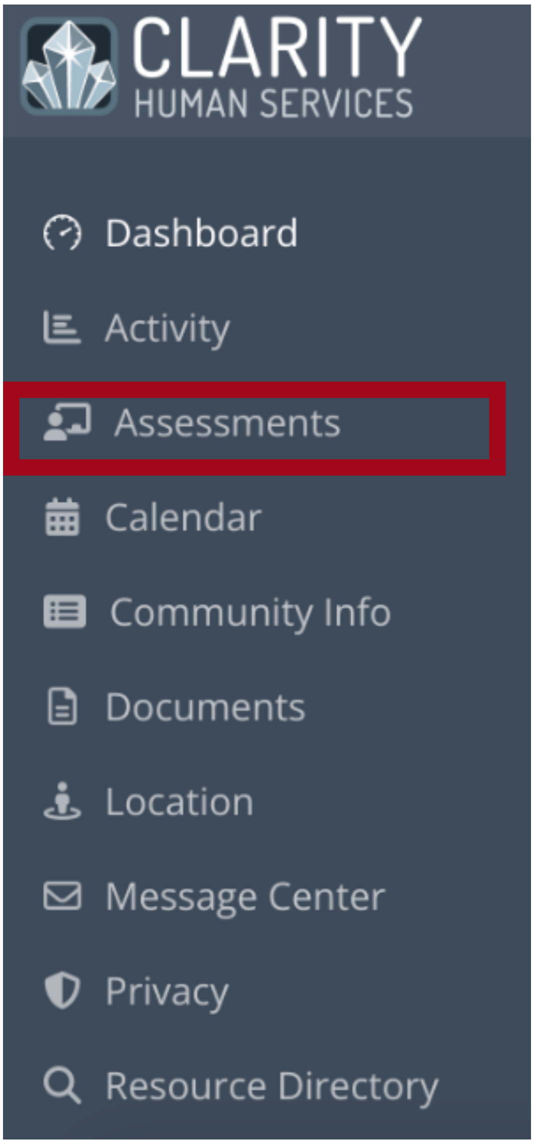
ASSESSMENTS

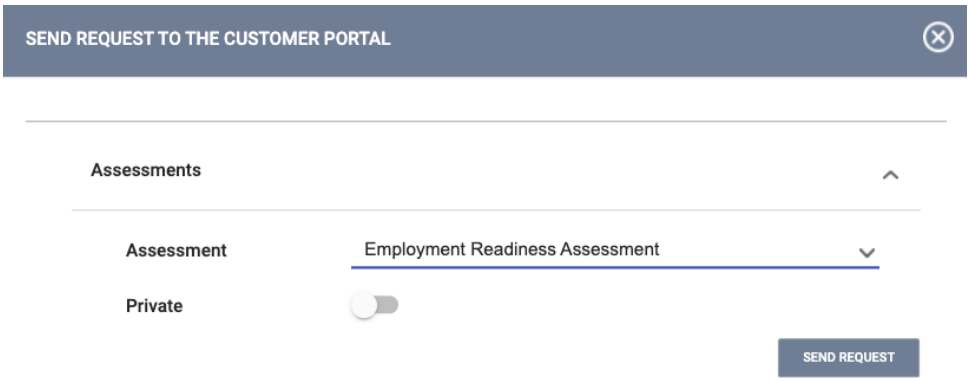
The Assessments feature allows clients to complete and submit provider-issued assessments directly from their personal device and at their convenience. Assessments must be reviewed and approved for **MyConnect**SV submission by **MyConnect**SV Working Group and made available for providers by the system administrator. Not all assessments are appropriate for **MyConnect**SV submission; some, such as the VI-SPDAT assessment series, should only be completed by providers within Clarity.

Both global assessments and program-level assessments can be submitted through **MyConnect**SV. Clients will receive a notification when a request for an assessment has been submitted.



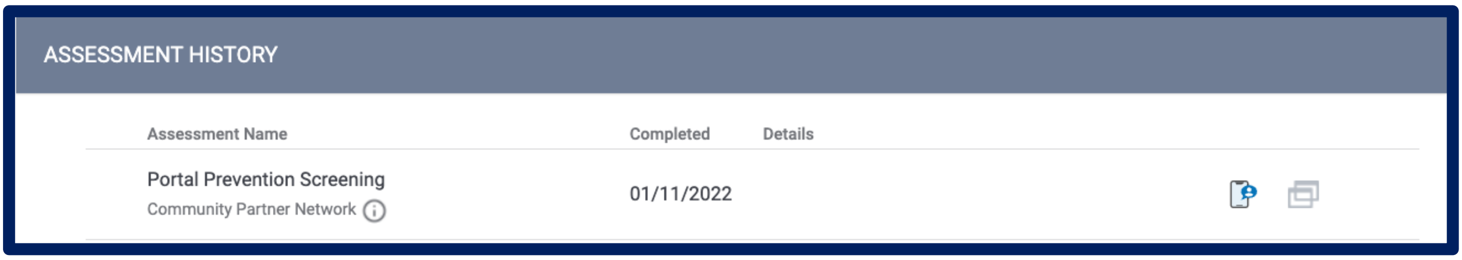
Sending & Reviewing Global Assessments

Global-level assessments are assessments that are not associated with a program enrollment. To send a global-level assessment to an **individual**, navigate to the client's profile screen, open **MyConnect**SV request screen, and select **Send New Request**. Select the appropriate assessment from the drop-down menu and press **Send Request**. The client will receive an email or text message notifying them of the request, and a notification and request banner will appear in **MyConnect**SV at next log-in.



Mass Assessment Request: To send a mass Assessment request to multiple individuals at one time, follow the process for **Mass Requests** detailed on page 14.

Once the assessment has been completed and submitted by the client, it will be available for review in the client's assessment history. **MyConnect** SV icon appears in the assessment details sections to indicate the client completed it through **MyConnect**SV.

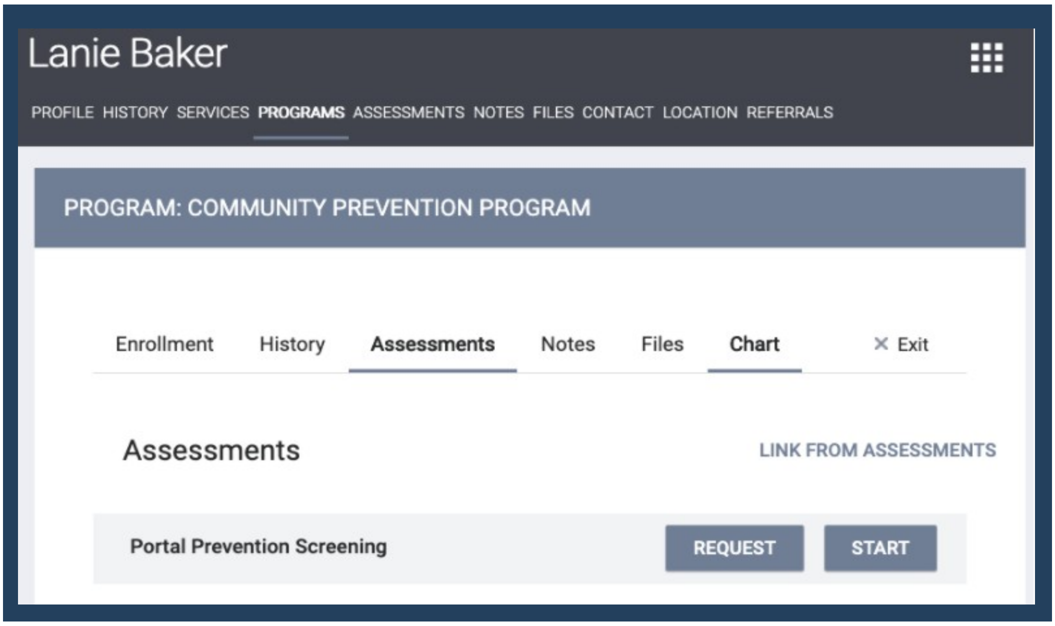


ASSESSMENTS

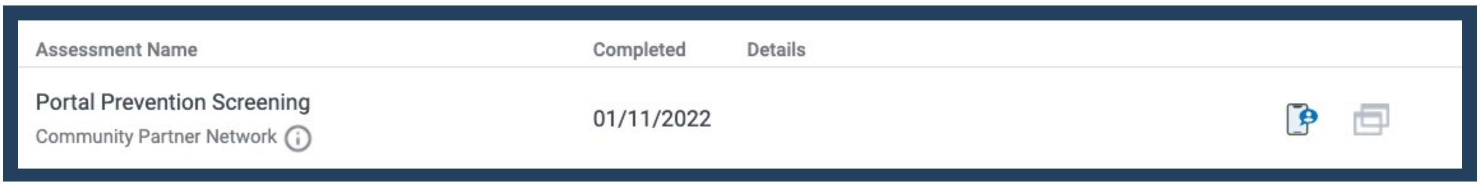
Sending Program-Level Assessments

Program-level assessments are assessments that are completed through a program enrollment. To send a program-level assessment, open the client's enrollment record and navigate to the assessments tab.

Assessments enabled for submission through **MyConnect**SV will be indicated with a **Request** option. Select **Request** and click **Send Request** to complete the transaction. The client will receive an email or text message notifying them of the request if enabled in their settings, and a notification and request banner will appear in **MyConnect**SV at next log-in.



Once the assessment has been completed and submitted by the client, it will be available for review in the client's program enrollment assessment history. **MyConnect**SV icon appears in the assessment details section to indicate the client completed it through **MyConnect**SV.

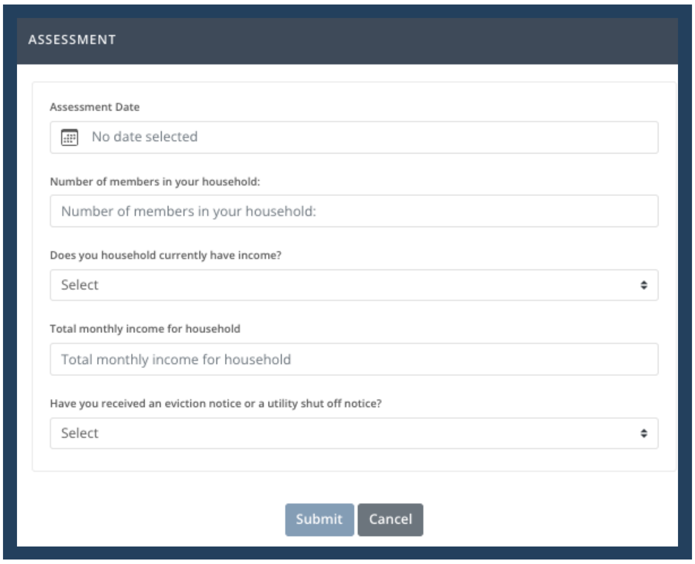


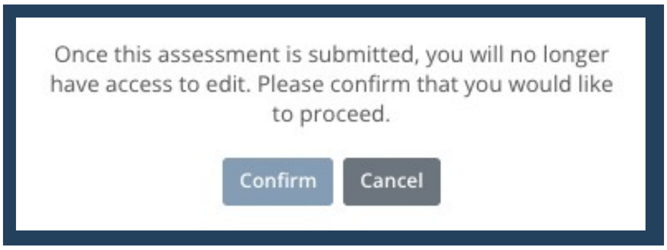
ASSESSMENTS: Client Instructions

Completing an Assessment

Once a provider initiates a request for an assessment, the client will receive a notification through **MyConnect**SV after their next login and may also receive an email or SMS if enabled. Clients can respond to the request by clicking the notification or selecting the Assessment screen in the navigation pane.

Once the client clicks the banner, the assessment will open and clients can enter their responses and complete the assessment. After pressing **Submit**, the client will receive a warning stating that the assessment cannot be edited after submission. Clients will need to press **Confirm** to successfully submit the assessment.





Reviewing a Previous Assessment

Clients have the ability to review previous assessments submitted through **MyConnect**SV. All previous assessments are available in the assessment history pane. Clients can click on the assessment of interest and review their responses. Note: Previously submitted responses cannot be edited by the client

Use Case & Promising Practices

The Assessment Management feature allows clients to quickly and easily complete assessments from their personal device and at their convenience. Assessment Management provides a potential opportunity to eliminate an in-person appointment while maintaining privacy and confidentiality.

- **Explain to clients how you might use this information:** Advise clients that they will be receiving an assessment request before submitting a request through **MyConnect**SV. Provide clients with information on why you're requesting the assessment, how you will use the information, and allow the opportunity to ask any questions.

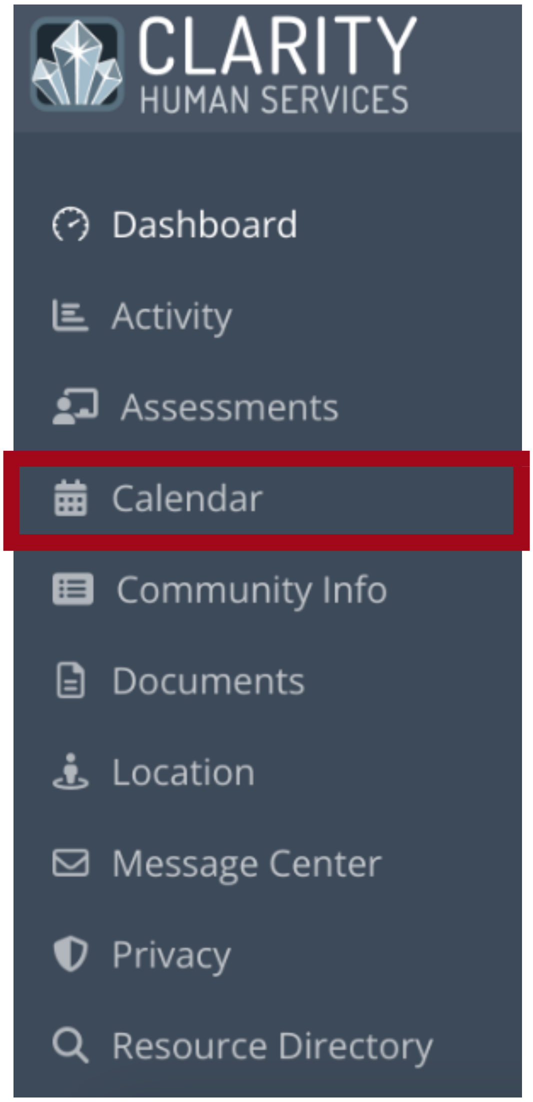
- Explain to clients that their responses remain confidential and follow the same guidelines as assessments issued by a care team member. Encourage clients to reach out to their care team members through the message center or a phone call if they have any questions about the assessment.

- Explain to clients that they have the right to request an assessment be issued by a care team member or provider.

- Encourage clients to respond to the assessment request as soon as possible so that services are not delayed.

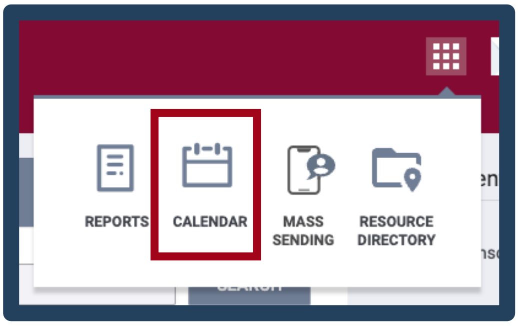
CALENDAR

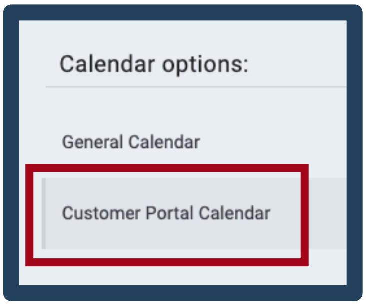
The Calendar feature allows providers to schedule client appointments and post appointment availability directly within Clarity. Clients can schedule appointments with care team members based on their posted available time slots. Appointment details and notifications are then made available to the client through their **MyConnect**SV account. The Calendar allows providers to manage all client appointments in one centralized location and ensures clients always have access to appointment details.



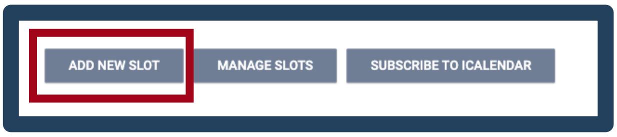
How to Post Available Appointment Slots

In Clarity, navigate to the Calendar in the launchpad, and then click on "Customer Portal Calendar" in the right sidebar:

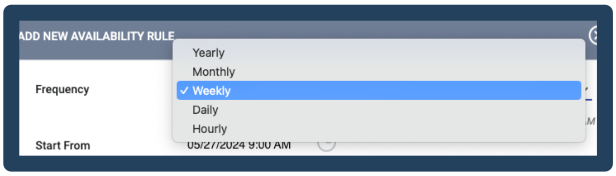




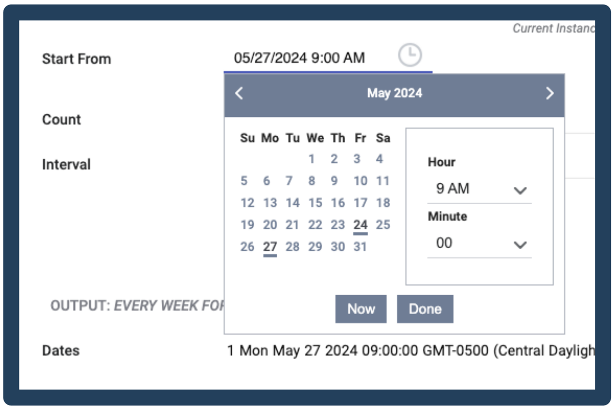
Click "Add New Slot" under the displayed calendar:



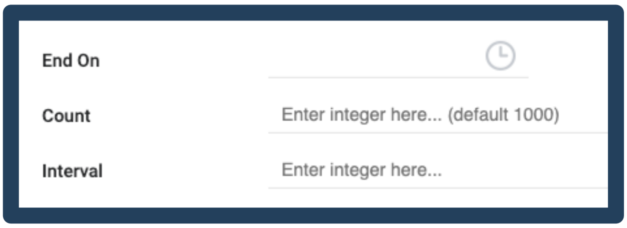
First, choose the **Frequency** you want this appointment slot to repeat:



Next, choose the **Start From** date and time when you want the first appointment slot to occur:

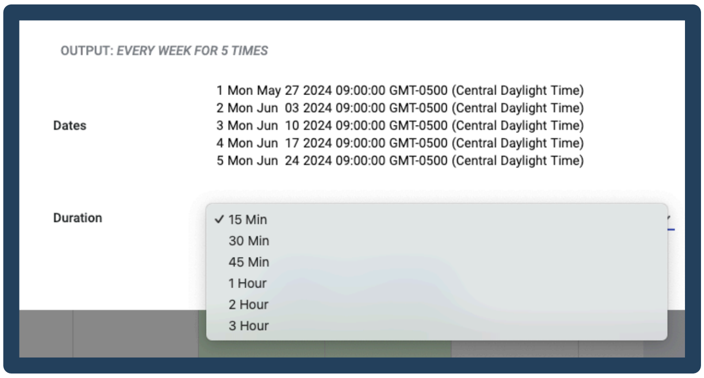


You can choose either an **End On** date when you want the series to end, ***or*** specify the **Count** of appointment slots you want to schedule *(Note: only one of these options can be used, so entering in either an End On date or Count will cause the other field to disappear).*



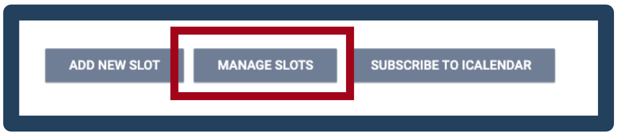
You can also choose an optional **Interval** between each frequency if desired (for example, to repeat the time every 3 days or every 2 weeks, instead of every 1 day or 1 week).

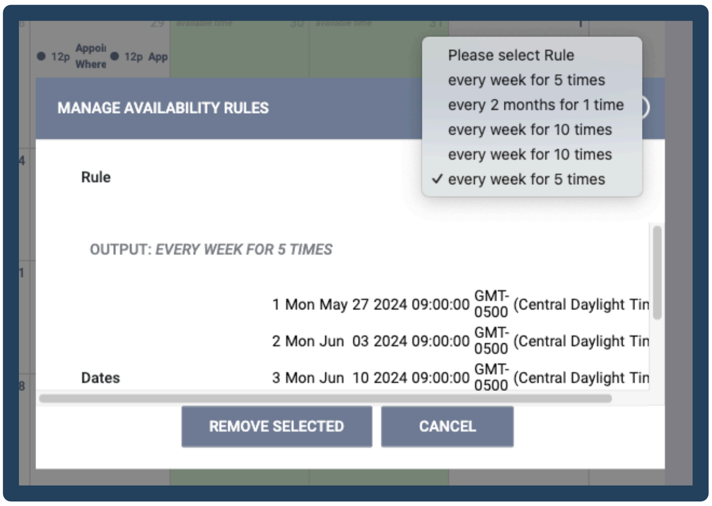
Review the **Output** and **Dates** preview, and then click **Save** to post the new appointment slots. After saving, clients on your care team with **MyConnect**SV accounts will be able to see your availability and directly schedule appointments with you.



You will be notified in your Clarity inbox when a client schedules a new appointment or cancels a previously scheduled appointment.

To remove an existing series of scheduled appointments, click on "Manage Slots". The choose the series in the dropdown list and click "Remove Selected".

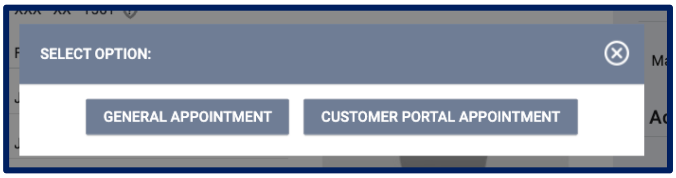




How to Schedule a Client Appointment

Schedule new appointments with clients using the calendar icon on the client's HMIS profile

If you'd like to schedule an appointment to fill an existing appointment slot, click **Customer Portal Appointment.** If you *don't* want to schedule an appointment to fill an existing appointment slot, click **General Appointment.**



Complete the fields and click **Save** to save the appointment.

How to Manage or Delete Appointments

To delete an appointment, select the appointment and click the trashcan icon. Adjustments to the appointment time or date cannot be made once the appointment is set. If adjustments are required, delete the original appointment through the calendar screen, and set a new appointment with the revised appointment details. More information on Clarity's Calendar features, including calendar integrations, can be found in our [Help Center Calendar article.]

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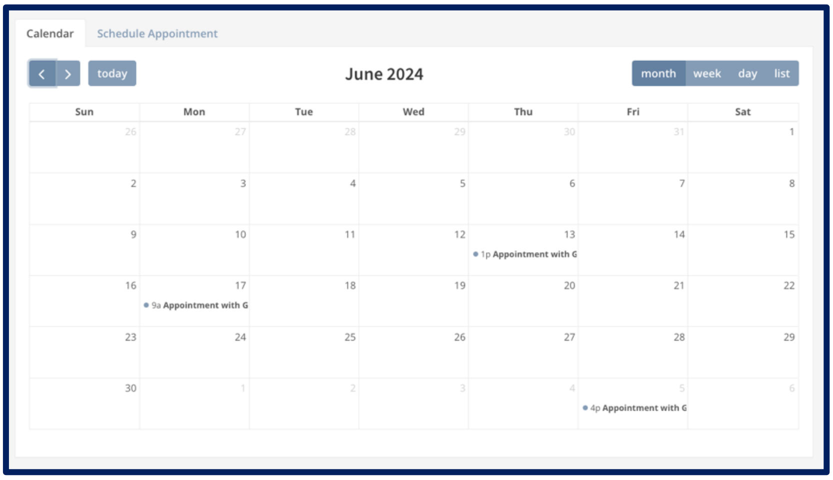
CALENDAR: Client Instructions

Clients can view a listing of all provider appointments scheduled through Clarity in the Calendar screen of their **MyConnect**SV account. Clients can select various views including an appointment list, or view by day, week, or month. Clients can also schedule appointments with care team members based on their posted available time slots.

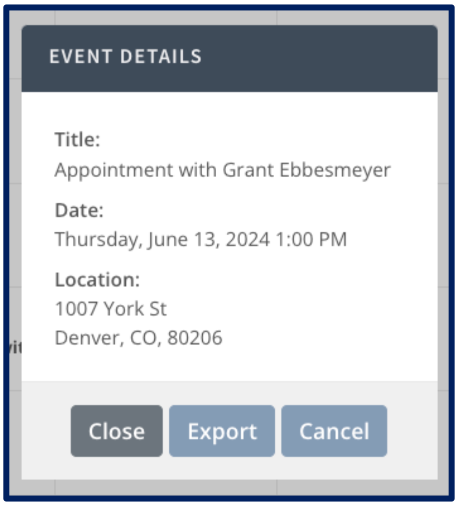
View upcoming appointments: Clients can view upcoming appointments by navigating to **Calendar.**

Clicking on any scheduled appointment will show a pop-up with additional appointment details, as well as the options to **Export** or **Cancel** the appointment.



Exporting appointment information: Clients can click on **Export** to export the appointment information as a calendar file, which can then be added to their phone or other external calendar. The client must agree to the Privacy and Security Warning prior to exporting the appointment information.

Canceling an appointment: Clients can click on **Cancel** to cancel an upcoming appointment. If an appointment is canceled, the Clarity user will be notified with a message.



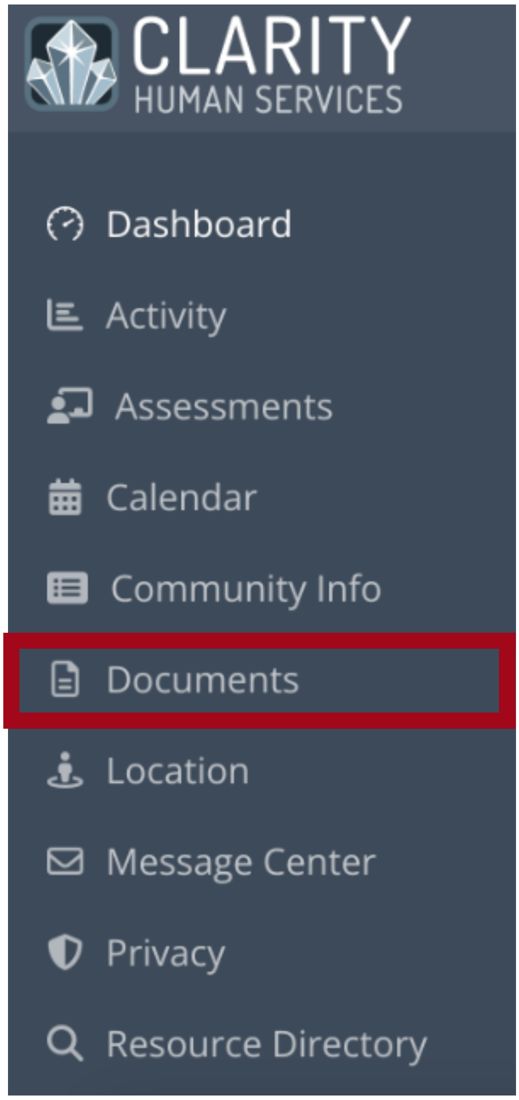
Use Case & Promising Practices

The Appointment Management feature allows providers and clients to manage appointments in a centralized location and helps ensure that clients have adequate access to appointment information.

- **Explain to clients how they might use this information:** The appointment management feature allows them to view all upcoming appointments with providers & care team members and can help remind them about appointments that they have scheduled with providers.
- If you have posted appointment slots, alert your clients by sending them a message through MyConnectSV so that they can utilize the appointment scheduling functionality to meet with you.

DOCUMENTS

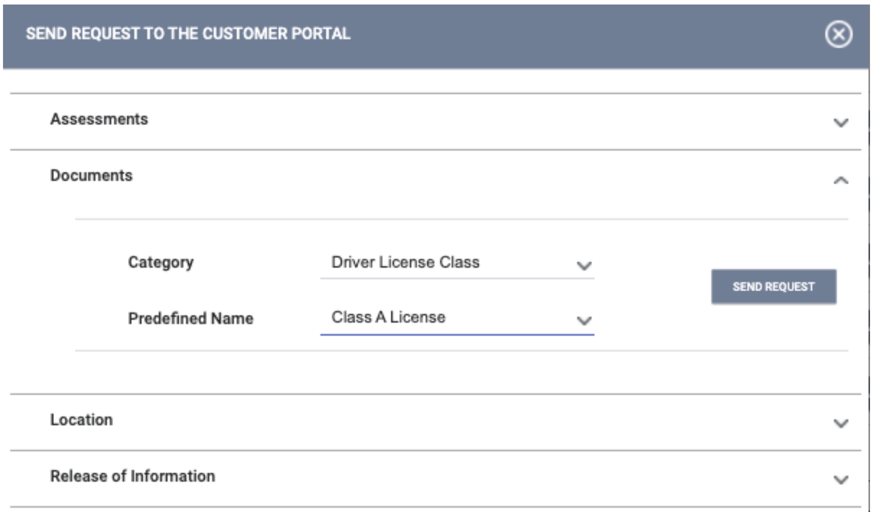
The Documentation Management feature allows clients to upload key documents at any time, and providers to request various forms of documentation from clients. Clients can then respond to the request and upload their personal documentation directly through **MyConnect**SV. Clients will be able to review any documentation previously uploaded through **MyConnect**SV.



How to Request Documents

Providers can send a new request for documentation to an individual through **MyConnect**SV using the "send new request" icon in **MyConnect**SV screen. Documentation requests can also be initiated through a program enrollment. Select the documentation type requested from the drop-down screen and click **Send Request.**

Mass Document Request: To send a mass Document request to multiple individuals at one time, follow the process for Mass Request detailed on page 14.



Clients can now submit multiple photos per request, so to request full multi-page documents (such as leases or income verification), you will only need to send one request per document requested.

Types of Documentation Available

Providers can request a variety of documentation from clients through **MyConnect**SV. Documentation categories may include:

- Family, Social, & Legal
- Finances & Income
- Health & Medical
- Education & Employment
- Personal Identification
- Military Service Records

Each category contains multiple types of documentation available for upload. To add additional file categories or documentation items, contact your system administrator.

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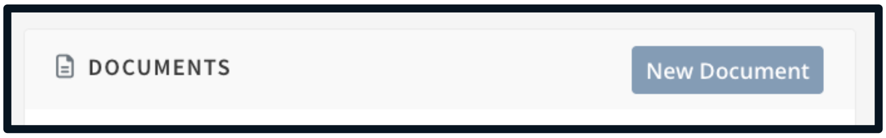
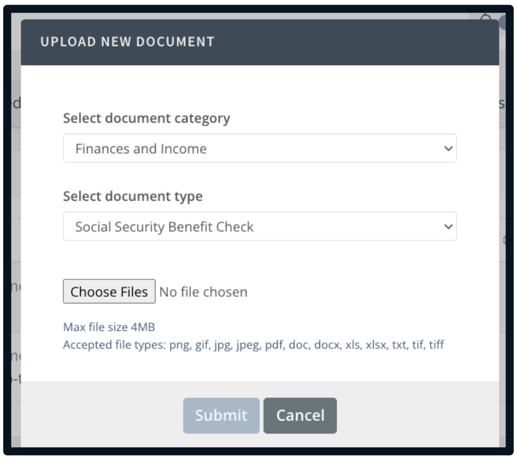
DOCUMENTS: Client Instructions

Clients can upload a new document at any time by navigating to **Documents** and clicking **New Document**

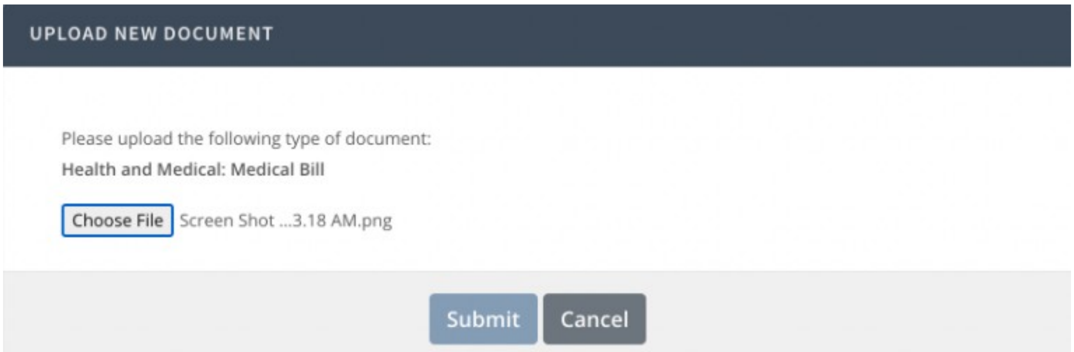


After doing so, they will use the dropdown arrows to select the document category and document type:

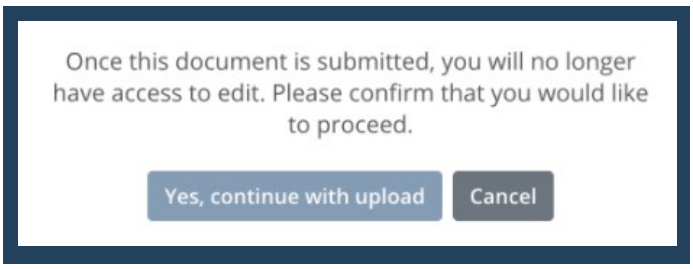


If a provider initiates a request, the client will receive a notification through **MyConnect**SV. Clients can respond to the request by clicking the notification or selecting the Documentation Management screen in the navigation pane.

Clients can then upload the documentation requested from the provider by clicking on the request banner. Clients can upload a PDF of the document, screenshot, or upload a photo (or multiple photos) using their mobile device.



When a client selects the file and clicks **Submit**, they will receive an additional notification warning stating that submitted documentation cannot be edited. Clients should click **Yes, Continue to Upload** to submit their documentation or **Cancel** to discontinue submission. Clients can view their submitted documentation by clicking on the document in the documentation history.



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DOCUMENTS: Client Instructions

Use Case & Promising Practices

The Documentation Management functionality allows clients to upload required documentation requested from their care team directly through **MyConnect**SV. Documentation requests can also be issued by providers outside of the care team.

Explain to clients how you might use this information: Advise clients that they will be receiving a document request before submitting a request through **MyConnect**SV. Provide clients with information on why you're requesting the document, how you will use the information, and allow the opportunity to ask any questions.

Encourage clients to respond to requests for documentation as soon as possible. Requests for documentation are often required for housing or services, and delays in submission could affect service provision.

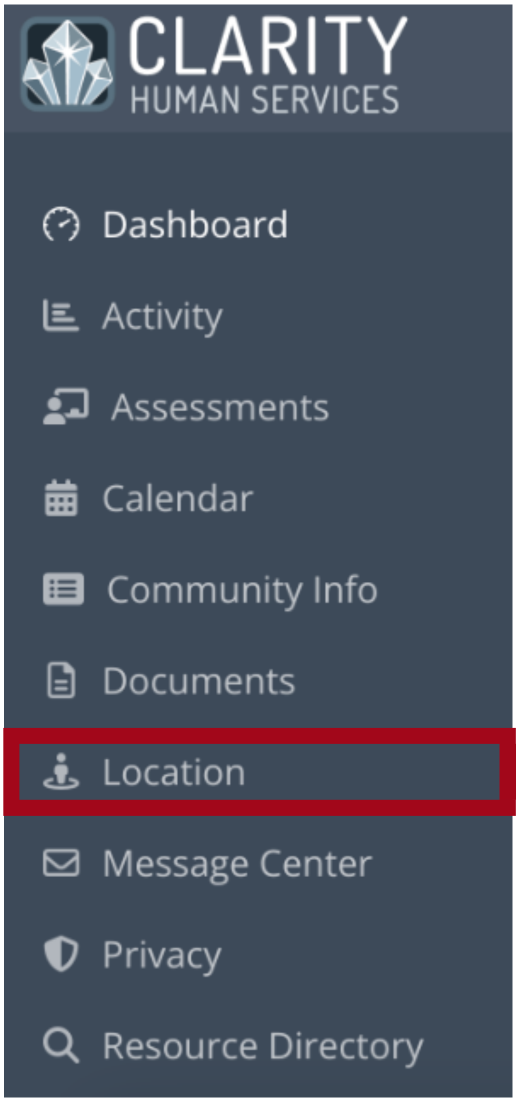
Explain to clients that they can securely upload PDFs, screenshots, or a photo of requested documents directly through **MyConnect**SV.

Explain to clients they will be notified through **MyConnect**SV when documentation has been requested, and they can also upload any documents they believe will be beneficial for their providers to be able to access.

Explain to clients that they can view any previous documentation uploaded through the documentation history screen. Explain to clients that once a document has been submitted, they cannot modify or edit it.

LOCATION

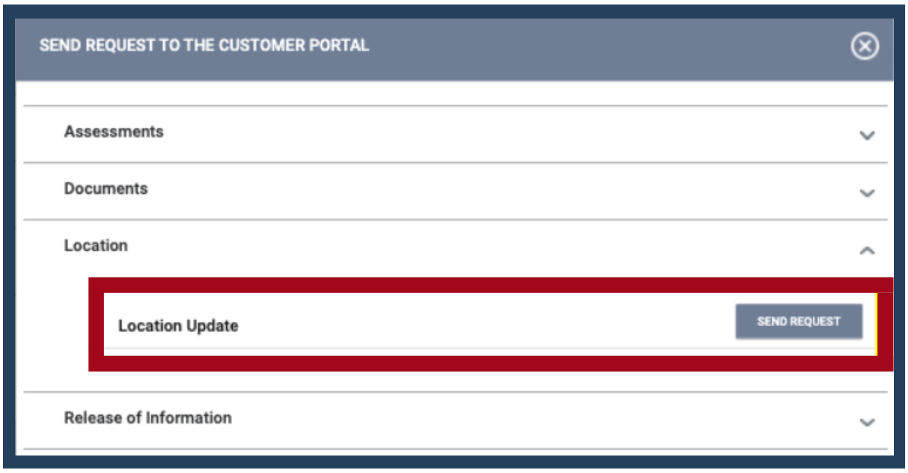
The location feature allows clients to share their address or GPS location through **MyConnect**SV. Clients can add new locations at any time, and providers are able to send requests for updated location information through Clarity.



How to Request a Location Update

Send a location request to an individual through **MyConnect**SV icon on the client's HMIS profile page. Select **Location Update** from the drop-down screen.

Mass Location Request: To send a mass Location request to multiple individuals at one time, follow the process for Mass Requests detailed on page 14.



Viewing Location Updates

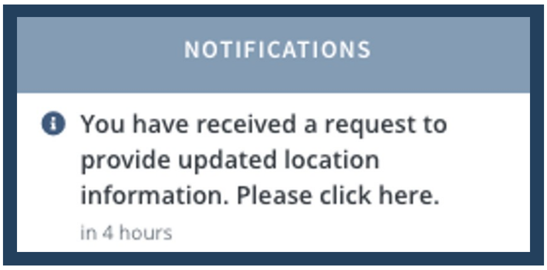
Once the client submits new location information, it is available for review in the Location screen of the client's HMIS profile.

Client-supplied location updates are marked with **MyConnect**SV icon.

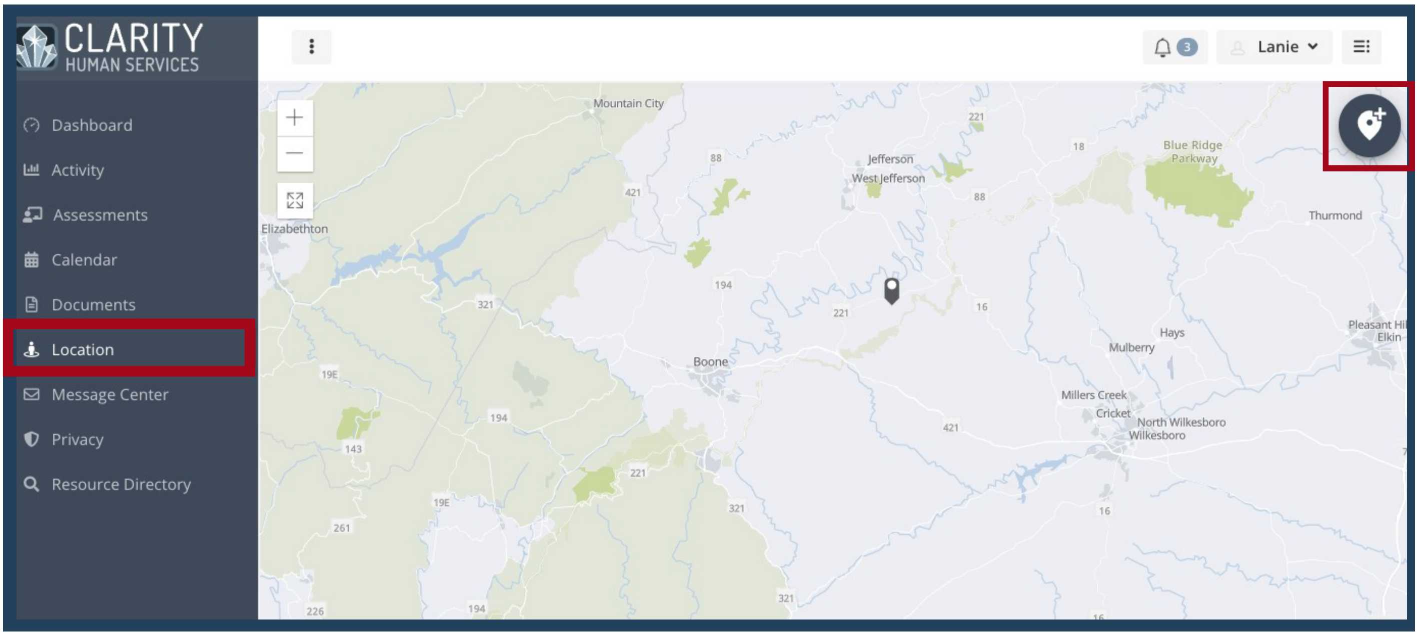
Additionally, if the client has submitted a **Note** with their location, it will appear by hovering over the Note box icon:

LOCATION: Client Instructions

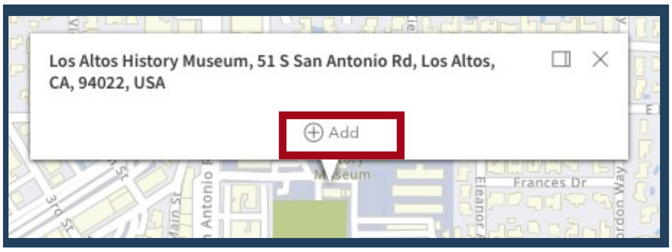
Clients can update their location at any time through **MyConnect**SV's Location screen. Clients can also receive requests for location updates from providers. Clients should take the following steps to add a new location or respond to a provider request. When a location request is sent, the client will receive a notification asking them to add a location update through **MyConnect**SV.



Clients can click the notification or open the location feature using the navigation pane to add a new location. Add a new address or GPS location by clicking the **Add Location** icon at the top right-hand corner of the location screen.

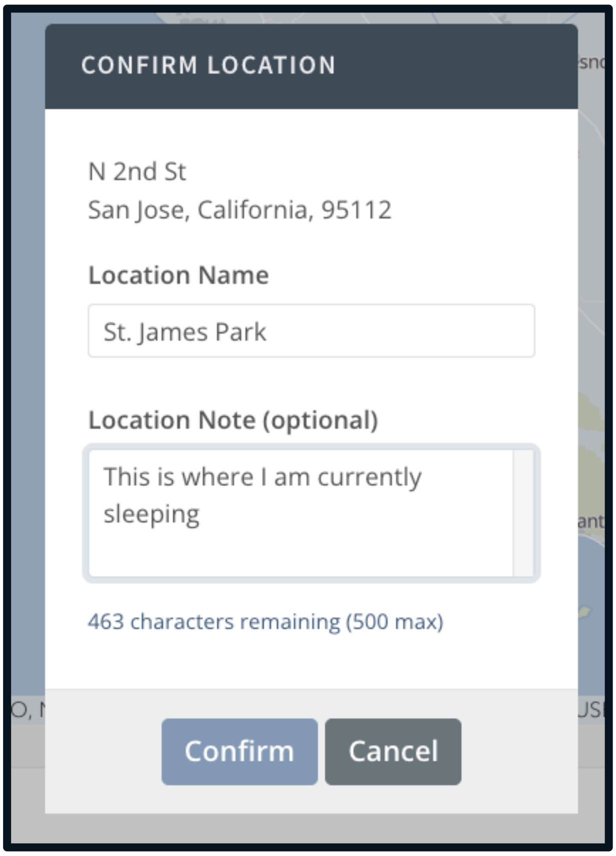


Clients can share their current location using the GPS signal associated with their device by clicking the **Use Current Location** visible below the search bar. Each device is different, so you may need to research how to enable location sharing for a client's device if it is not working as anticipated. The map will orient to the client's location and an address will be displayed. Clients can save their location by selecting the **Add** icon. Clients can also enter an address into the search field and save the location following the same steps as above.

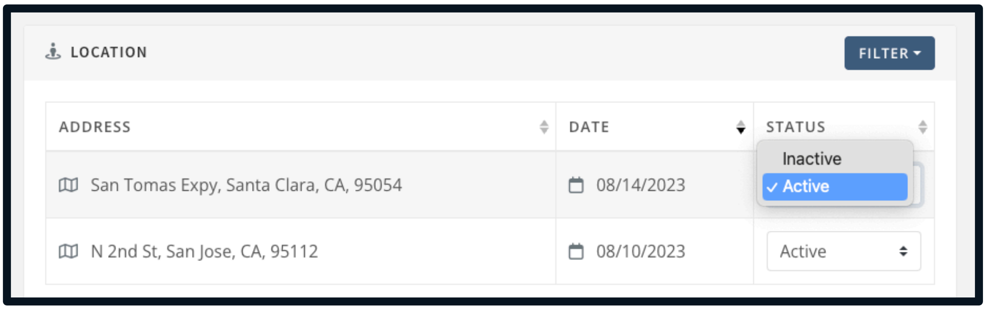


LOCATION: Client Instructions

If a provider initiates a request, the client will receive a notification through **MyConnect**SV. Clients can respond to the request by clicking the notification or selecting the Documentation Management screen in the navigation pane.



After a location has been added, it will be visible in the user's location history tab. After a location has been added, the user can choose to make it "Inactive" by selecting the option in the "Status" dropdown. This allows clients to filter the location out, so it no longer appears on the map and in their location history.

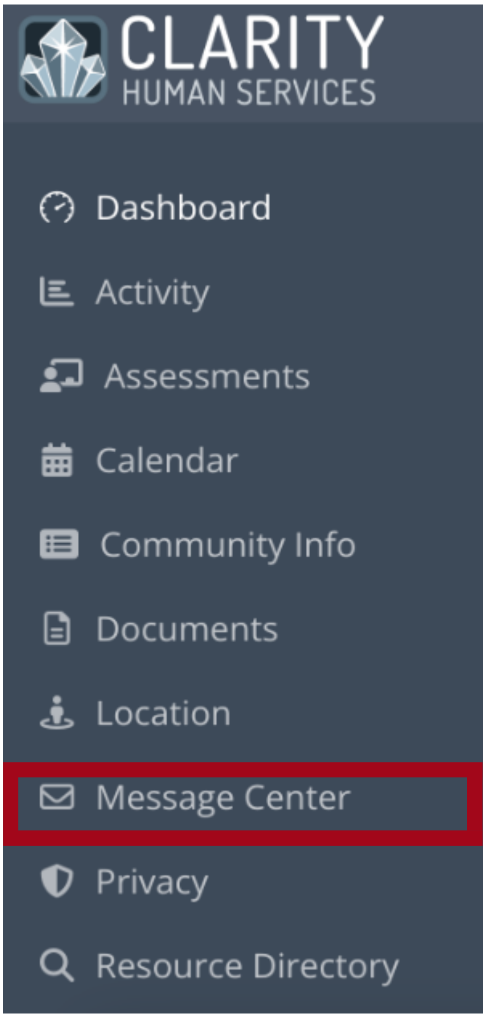


Use Case & Promising Practices

- The Location Feature allows **MyConnect**SV users to share their location with their care team members. This feature can help providers quickly locate **MyConnect**SV users and may assist in expediting services.
- **Explain to clients how you might use this information:** The Location feature helps care team members quickly locate them for services or other related needs. The Location feature is **NOT INTENDED** to track clients but rather to assist with connection to services. Care team members can only view the locations that clients choose to share with them.
- Explain to the client that their care team members can request a location update through **MyConnect**SV. They are also able to update their location at any time.
- Encourage clients to add Notes to the Locations they choose to share to provide additional information and context.
- Explain to the client that they must enable Location Services on their personal device to share their location using the GPS location.
- Encourage clients to update their location whenever they have a change of address, relocate their encampment, obtain a new temporary residence, or any other situation impacting location.
- Encourage clients to respond to location requests as soon as possible. It's often a sign that a care team member is attempting to make contact for services or other requests.

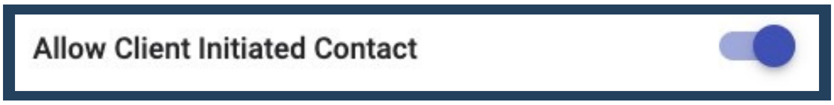
MESSAGE CENTER

The Message Center feature provides a secure communication channel between clients and care team members. Clients and providers can track conversations in a single platform, and Message Center retains the conversation history for future reference. All users also can turn off contact through the Message Center if desired.



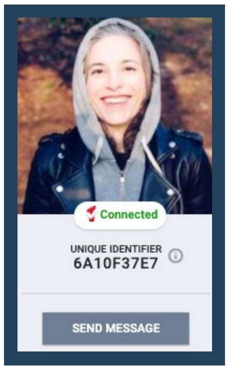
Allow Client Initiated Contact

By default, clients and care team members can receive incoming messages but have the option to turn off incoming messages. To turn off client initiated contact, navigate to account settings and turn off the **Allow Client Initiated Contact** in the My Info pane. Press **Save Changes** button to ensure the settings are updated.



Sending a New Message

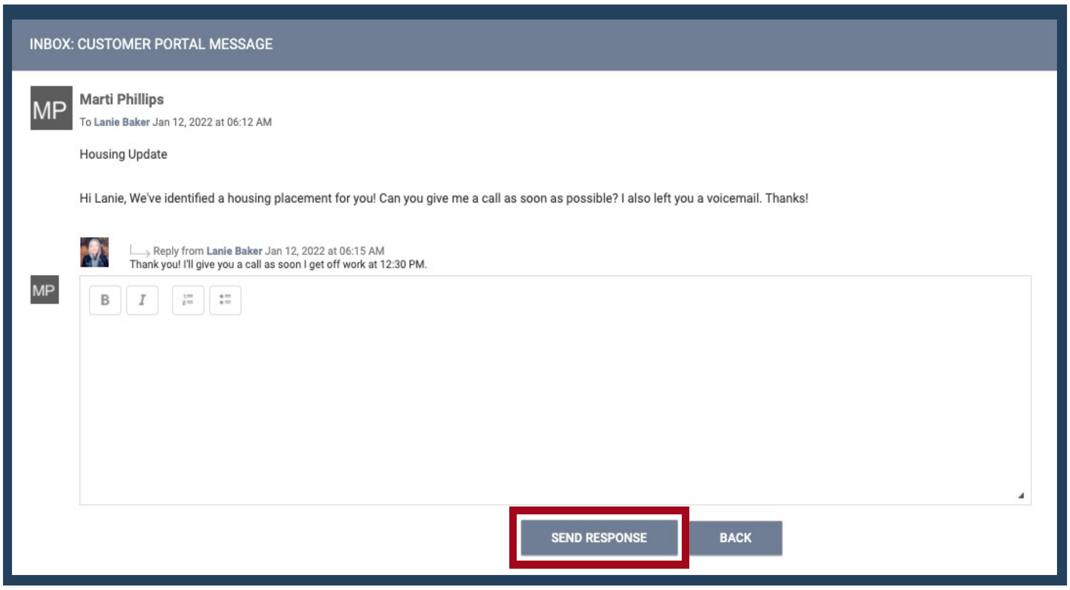
To send a new message to a single client, navigate to the client's Clarity profile and press the **Send Message** button under the client's photo. Draft your message and select **Send Message** when complete. Copies of sent messages are available in the Clarity Inbox.



Mass Message: To send a mass Message to multiple individuals at one time, follow the process for Mass Requests detailed on page 14.

Responding to a Message

View and respond to incoming messages in the Clarity Inbox. An alert will appear next to the inbox icon when new messages are received, and any new messages will be displayed under unread messages. To respond to a message, open the message of choice, draft response, and select **Send Response.**

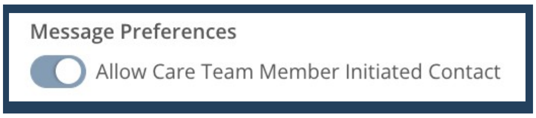


MESSAGE CENTER: Client Instructions

The Message Center allows clients to initiate and respond to messages from care team members through a confidential and secure channel. Clients are able to conveniently track conversations will all providers and view previous conversation history.

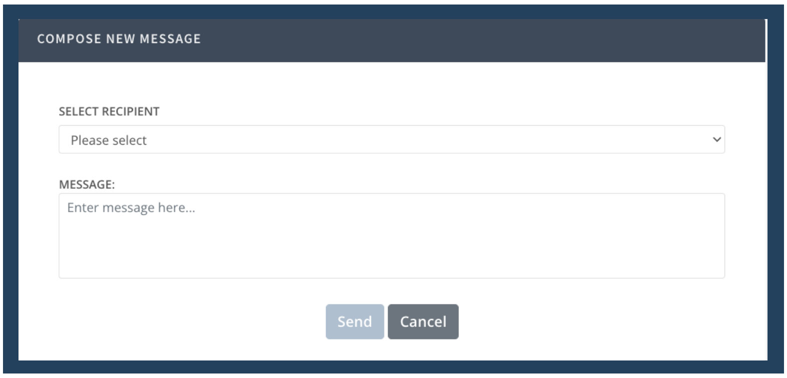
Allow Care Team Initiated Contact

By default, a client's care team members are able to initiate contact with a client through **MyConnect**SV. Clients can opt to turn off care team initiated messages through **MyConnect**SV's Profile Settings by toggling off the **Allow Care Team Member Initiated Contact** option under the preferences pane.



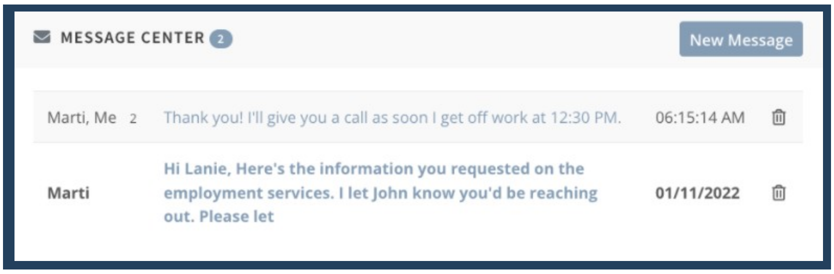
Care Team Member

Clients can send a new message to a care team emmeber through the Message Center pane. Clients should select **New Message**, select the proper recipient, draft a message, and press **Send.** A copy of the message will be available for review in the client's inbox



Responding to a Message

When clients receive a message from a care team member, they will receive an alert at their next login and may receive an email or SMS if enabled. Clients can view the message by clicking on the notification or navigating to the Message Center. New and unopened messages will be displayed in bold. To respond, clients should open the message, draft a response, and select **Send**.



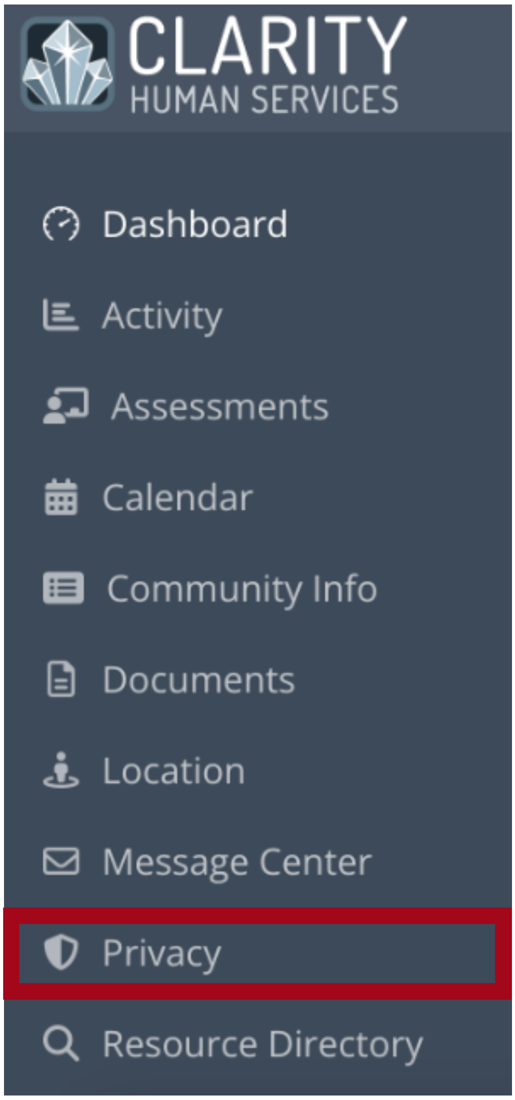
Use Case & Promising Practices

The Message Center feature streamlines communication between clients and providers and keeps communication organized in a centralized location.

- **Explain to clients how they might use this feature:** Explain to the client that they can send and receive messages to easily communicate with their care team members through the Message Center.
- Explain to the client that the Message Center is a secure communication channel and all information shared is confidential.
- Explain to the client that they have the option to turn messaging off in their **MyConnect**SV Profile Settings. Encourage the client to leave messaging on so that they can receive communication from their care team member. Messaging is a helpful tool for communicating updates, service needs, referral status, etc.

PRIVACY

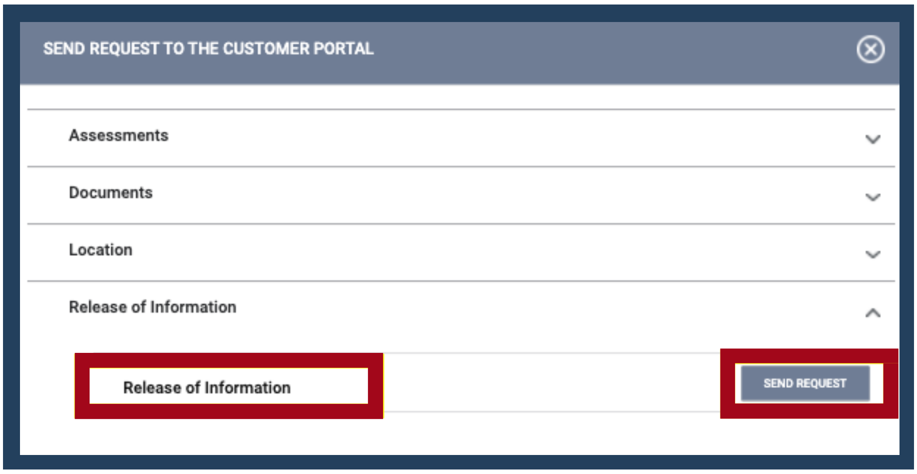
The Privacy Management feature provides an online resource for easy access and management of Releases of Information (ROIs). Quickly resolve an expired ROI by requesting a new ROI from clients through **MyConnect**SV. The Privacy Management feature allows clients to electronically sign a new ROI or securely upload the documentation into their **MyConnect**SV account. Clients are also able to view and download their current ROIs.



How to Request a New ROI

Request a new ROI through **MyConnect**SV Request icon located on the client profile. Select **Send New Request** and then select to send a request for a "**Release of Information"** through the drop-down menu.

Mass ROI Request: To send a mass ROI request to multiple individuals at one time, follow the process for Mass Requests detailed on page 14.



ROI Restrictions

There are a few important restrictions on ROIs that providers should be aware of. Providers are only able to initiate one ROI request per client at one time.

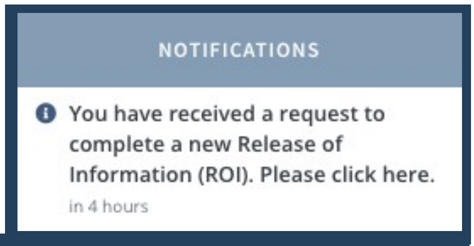
Additionally, the client's previous ROI must be within two weeks of expiring in order to initiate a request.

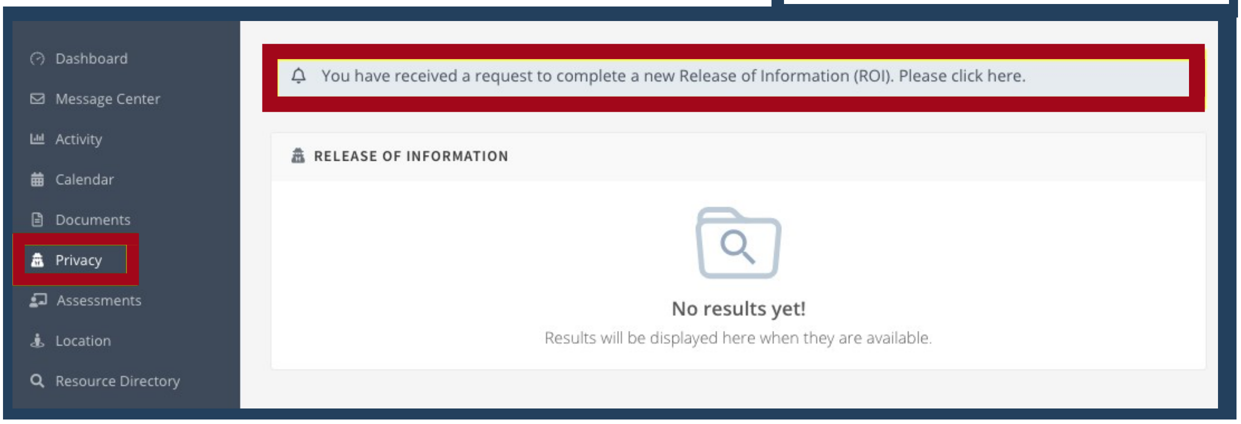
Revoking or Amending an ROI

To ensure proper ROI revocation protocols, clients are not able to revoke or amend an existing ROI through **MyConnect**SV. If they need to make changes to a current ROI, they must contact their provider directly.

PRIVACY: Client Instructions

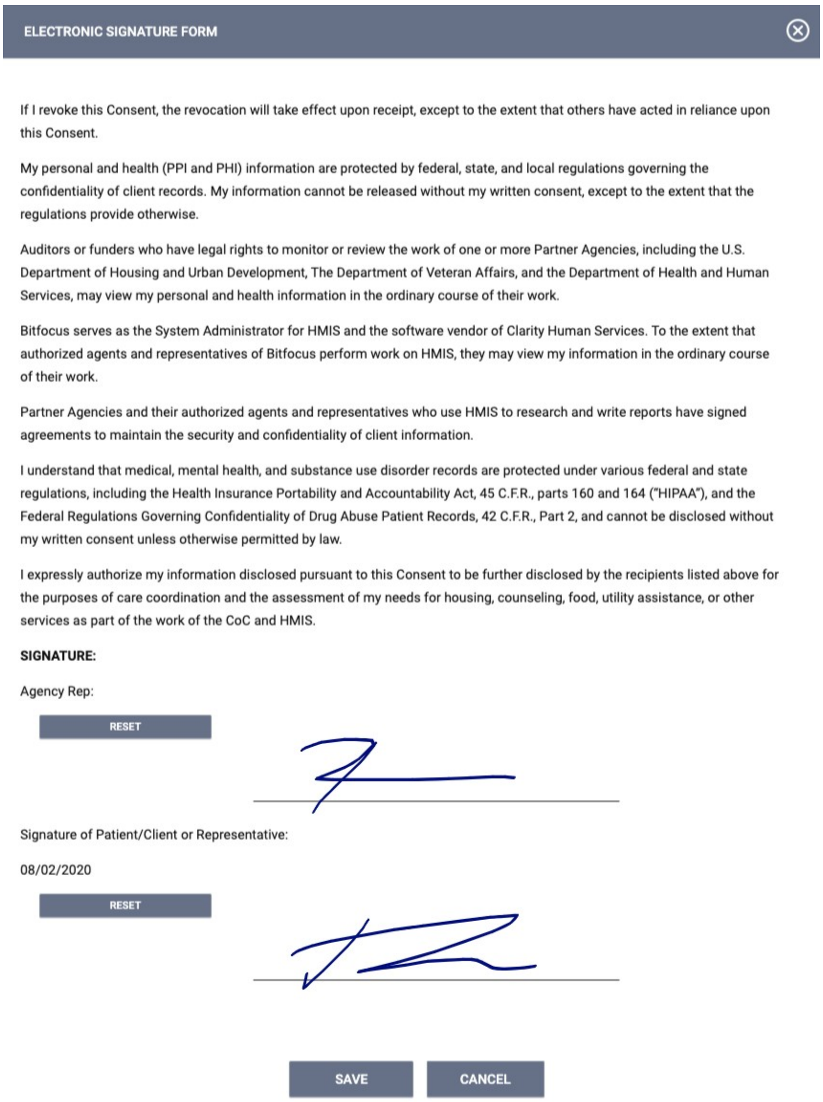
After a care team member requests a new ROI through **MyConnect**SV, clients will receive a notification. Clients can respond to the request by clicking on the notification or by opening the Privacy Management in the navigation pane.





Clients can complete a new ROI by clicking the link in the banner depicted above. The electronic signature form will be displayed for the client to sign electronically and submit directly within **MyConnect**SV.

After adding an electronic signature, clients must click **Apply** to successfully save the signature and complete submission.


ELECTRONIC SIGNATURE FORM

If I revoke this Consent, the revocation will take effect upon receipt, except to the extent that others have acted in reliance upon this Consent.

My personal and health (PPI and PHI) information are protected by federal, state, and local regulations governing the confidentiality of client records. My information cannot be released without my written consent, except to the extent that the regulations provide otherwise.

Auditors or funders who have legal rights to monitor or review the work of one or more Partner Agencies, including the U.S. Department of Housing and Urban Development, The Department of Veteran Affairs, and the Department of Health and Human Services, may view my personal and health information in the ordinary course of their work.

Bitfocus serves as the System Administrator for HMIS and the software vendor of Clarity Human Services. To the extent that authorized agents and representatives of Bitfocus perform work on HMIS, they may view my information in the ordinary course of their work.

Partner Agencies and their authorized agents and representatives who use HMIS to research and write reports have signed agreements to maintain the security and confidentiality of client information.

I understand that medical, mental health, and substance use disorder records are protected under various federal and state regulations, including the Health Insurance Portability and Accountability Act, 45 C.F.R., parts 160 and 164 ("HIPAA"), and the Federal Regulations Governing Confidentiality of Drug Abuse Patient Records, 42 C.F.R., Part 2, and cannot be disclosed without my written consent unless otherwise permitted by law.

I expressly authorize my information disclosed pursuant to this Consent to be further disclosed by the recipients listed above for the purposes of care coordination and the assessment of my needs for housing, counseling, food, utility assistance, or other services as part of the work of the CoC and HMIS.

SIGNATURE:

Agency Rep:

RESET

Signature of Patient/Client or Representative:

08/02/2020

RESET

SAVE CANCEL

PRIVACY: Client Instructions

Clients can view their previously submitted ROIs by clicking the icon in the ROI history screen. It is important to note that clients cannot modify or revoke any current or previous ROIs through **MyConnect**SV. They should contact their care team member directly to request revisions or revoke their ROI.

RELEASE OF INFORMATION

	PERMISSION	TYPE	START DATE	END DATE
	Yes	Electronic Signature	09/07/2021	09/07/2024

Use Case & Promising Practices

The Privacy Management feature allows clients to quickly and easily sign and submit a new Release of Information directly through **MyConnect**SV.

Explain to clients how you might use this feature: Explain to clients that a valid ROI helps providers to coordinate services, and that expired or missing ROIs can lead to delays in service or housing.

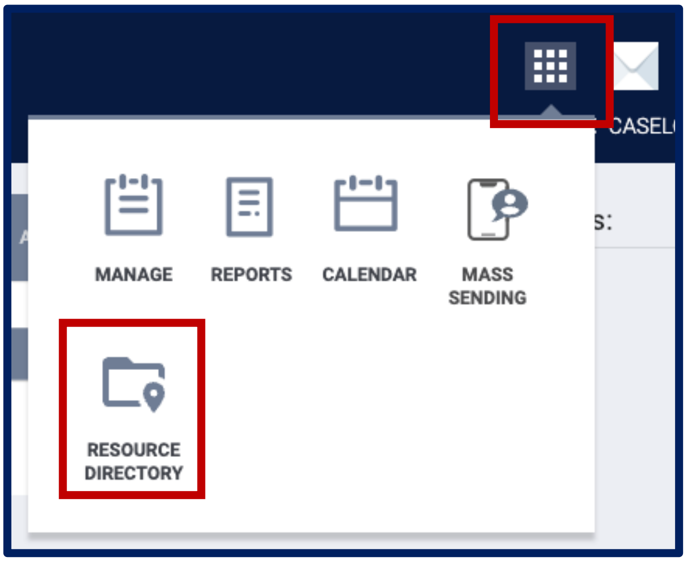
Explain that clients cannot revise or revoke their current ROI within **MyConnect**SV. They must contact their care team member to make any revisions to their current ROI.

Encourage clients to respond to ROI requests right away so that housing and services are not delayed.

RESOURCE DIRECTORY

Providers can now utilize a Resource Directory within Clarity Human Services! Providers will see the same information about resources that participants can access through the MyConnectSV Resource Directory.

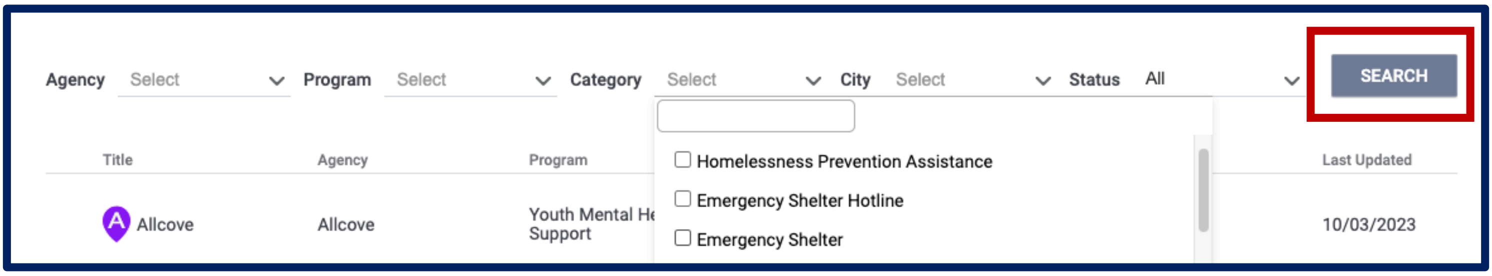
If you have an update to any of the resources included in the Resource Directory *or* a **new resource to add**, please submit this form: https://forms.gle/sdHo1h1Mq93sbSXp9

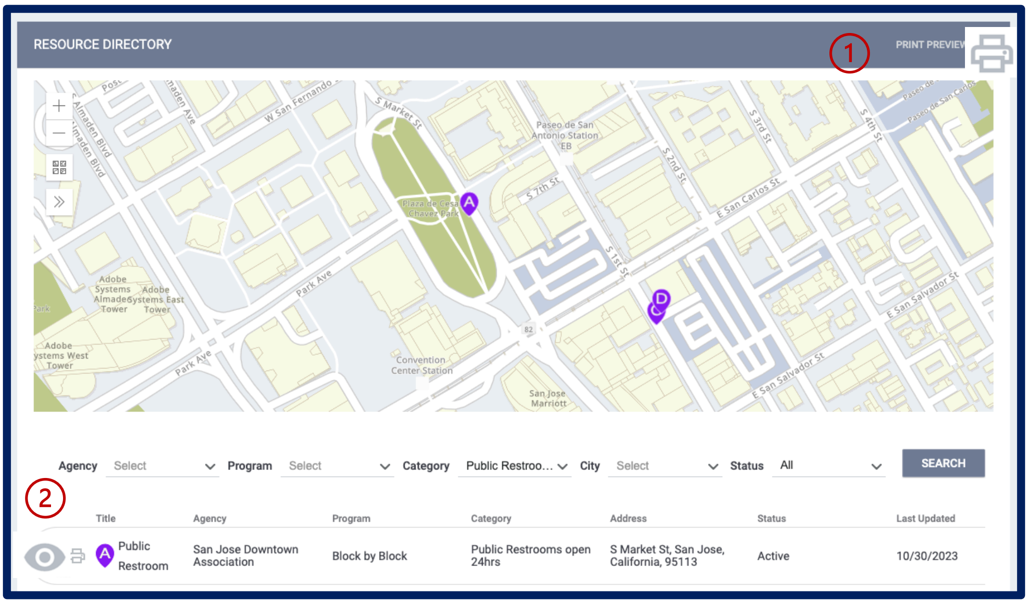


Provider Instructions

Navigate to the Resource Directory in Clarity through the launch pad.

Once in the Resource Directory, use the Agency, Program, Category, and/or City filters to choose one more options to filter; be sure to click Search to apply your filters and view the filtered results:





You can use the letters on the map to see the location of corresponding resources in the filtered list.
Use the **Print Preview** button to generate a printable list of resources and details for ***all* resources** included in the current filtered list.
Alternatively, to view or print information about only one resource included in the list, hover over the resource title and click on the eyeball icon to view additional info, or the print button to generate a printable view of that specific individual resource.

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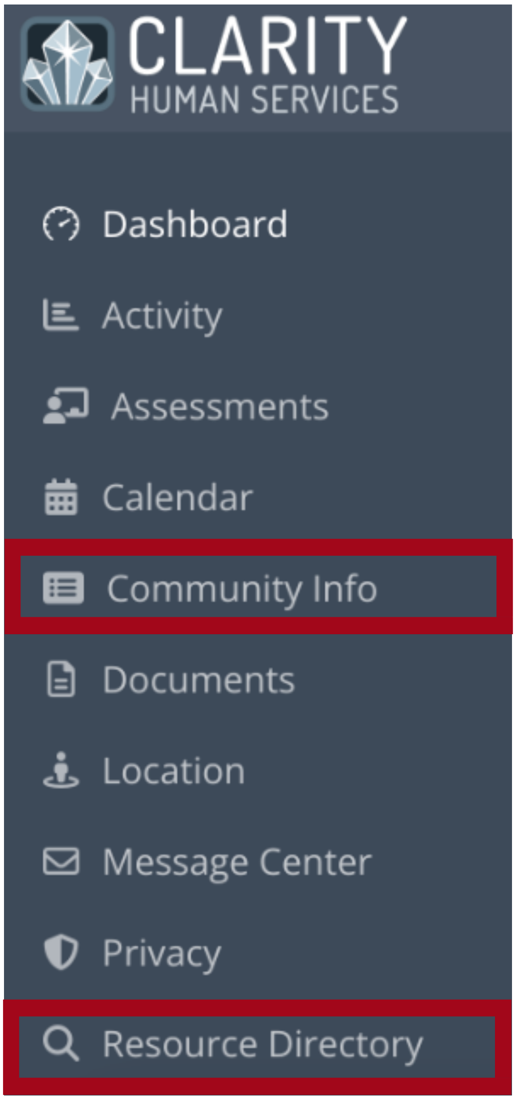
RESOURCE DIRECTORY & COMMUNITY INFO

The Community Info and Resource Directory both allow clients to get up-to-date local information. In Community Info, clients can view and filter articles with additional information, instructions, and/or links about services that may be available or local announcements. In the Resource Directory, clients can use a map with their current location to identify nearby resources, as well as view and filter resources by agency, category, and/or location.



Client Instructions

Community Info

Explain to clients that Community Info articles can be sorted by Title, Date Updated, or filtered using the “Category Filter” dropdown. Click on the title to view the full article and scroll down to the bottom to close or print the information.

Resource Directory

Explain to clients that the Resource Directory can be filtered by clicking “Filter Results.” Click on the directory item to view more information, click “Show more details” to view full information, and scroll down to the bottom to close or print the information.