

# Housing Provider HMIS User Manual

WA-500 Seattle/King County CoC



## About this Resource

The purpose of this document is to provide users with step-by-step guidance on how to engage with Clarity Inventory. Please use the table of content to direct you to specific topics of interest.



## Other Helpful Resources

- Visit the [Training Guides & Tools](#) Page of the HMIS Support Website
- Reach out to the Help Desk for Technical Assistance (206) 444-4001, Ext 2 | [kcsupport@bitfocus.com](mailto:kcsupport@bitfocus.com) | Chat widget directly in Clarity
- Stay apprised HMIS Inventory Events that may be occurring: [kingcounty.bitfocus.com/kc-events](https://kingcounty.bitfocus.com/kc-events)

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# Edit Building Attributes

## When would you do this?

You will edit building attributes when changes to the following occur:

1. Operating Hours
2. Transit Accessibility & Parking
3. Building Features & Accessibility
  - a. Uses of Communal Bathrooms
  - b. WiFi Availability
  - c. Laundry Facilities
4. Building Policy
  - a. Pets Allowed
  - b. Guests Allowed
5. Sobriety Policy
6. Max Lengths of Stay
7. Other Residential Policies
8. Eligibility Criteria
  - a. Sex Offender Screening Policies
9. On-Site Medical Services
10. Other On-Site Services
  - a. Housing Navigation
  - b. Case Management
  - c. Employment
11. Meals & Food Provided
12. Storage Availability
13. Building CE Participation

## Understanding Building CE Participation Attribute

### All Units Participate in CE

You must select “*All units participate in CE*” for the Building CE Participation attribute if the entire building receives referrals from Coordinated Entry only.

- When “*All units participate in CE*” is selected at the building level, unit CE participation is assumed, and you do not have to specify this specific component at the unit level.

### Some Units Participate in CE

You must select “*Some units participate in CE*” for the Building CE Participation attribute if only some building units receive referrals from Coordinated Entry.

- When “*Some units participate in CE*” is selected at the building level, specific unit participation must be identified within the unit attribute “Referral Pathway-Housing.” Review how to update Unit Attributes below.

### No Units Participate in CE

You must select “*No units participate in CE*” for the Building CE Participation attribute if no units receive referrals from Coordinated Entry.

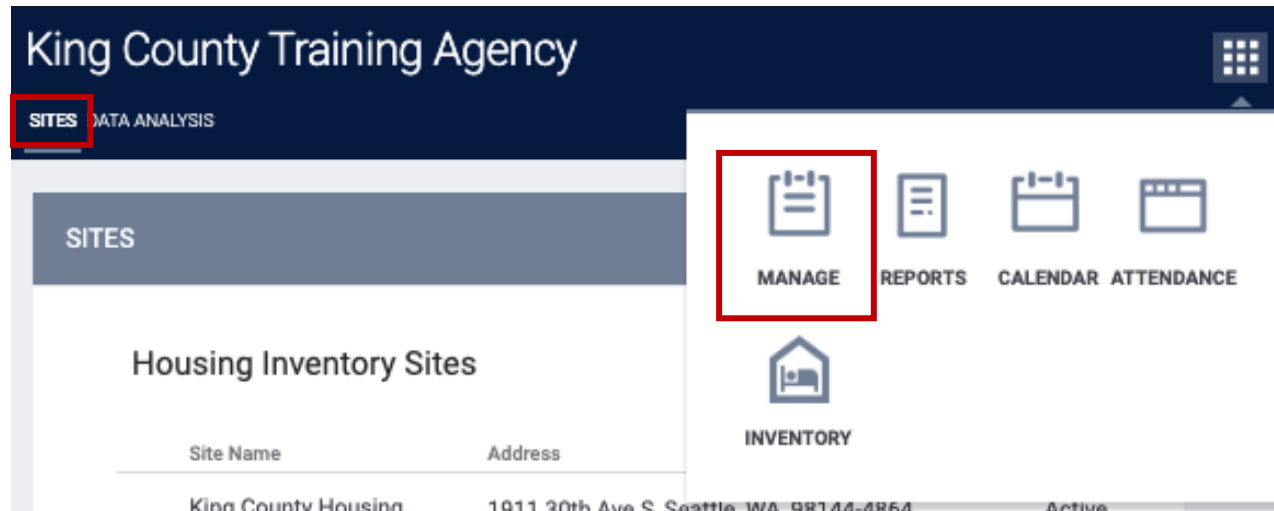
- When “*No units participate in CE*” is selected at the building level, unit non-participation is assumed, and you do not have to specify this attribute at the unit level.

## Important Reminders:

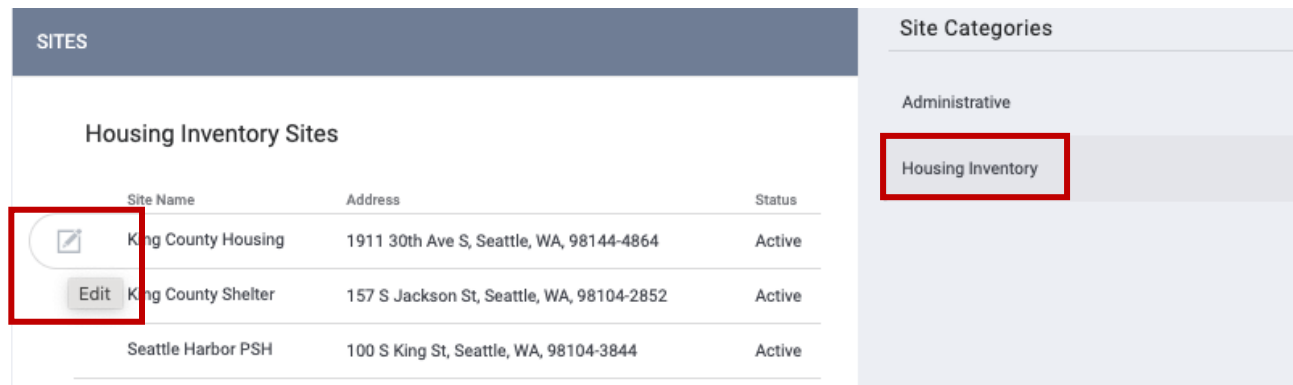
1. This designation must align with funder requirements. The default selection in Clarity for the Building CE Participation attribute is “Select.” You must make sure the Building CE Participation is accurate.
2. **For Rapid Re-Housing and Scattered Site Programs:** These programs do not have Buildings so CE participation must be indicated on the unit level.

## How to Update Building Attributes

1. Your user access role must have the ability to “Edit Sites - Administrative and Housing Inventory Entities” enabled.
  - a. If you don’t see “Manage” from your launchpad and/or the Sites tab, you need to have your agency lead request this access from the Help Desk.



2. After navigating to Manage>Sites, you will select “Housing Inventory” under Site Categories. From there you can Edit any of your agencies sites. Buildings are contained within Sites.
  - a. Please note, RRH programs do not have buildings - they only have Unit “Slots”.



3. Navigate to Buildings & Units where you will be able to edit Building Attributes.

**KING COUNTY HOUSING: BUILDINGS**

Building Name	Description	Status
King County PSH		Active

Managed with Clarity Human Services

**Site Resources**

- Overview
- Programs & Projects 1
- Buildings & Units 1**
- Funding Sources 0

**MODIFY BUILDING**

**Building Name** King County PSH

**Start Date** 01/01/2023

**Status** Active

# Edit Unit Attributes

## When would you do this?

You will edit unit attributes when changes to the following occur:

1. The Referral Pathway (If Unit Specific)
2. ADA and Other Unit Specific Features
3. Focus Population
4. Eligibility Criteria
  - a. Income Level Restrictions
  - b. Household Sizes
  - c. Demographics

**Please note:** The default selection in Clarity for the unit “Referral Pathway” attribute is “Select.” You must make sure the unit’s Referral Pathway is updated when a building has a blend of CE and Non-CE units.

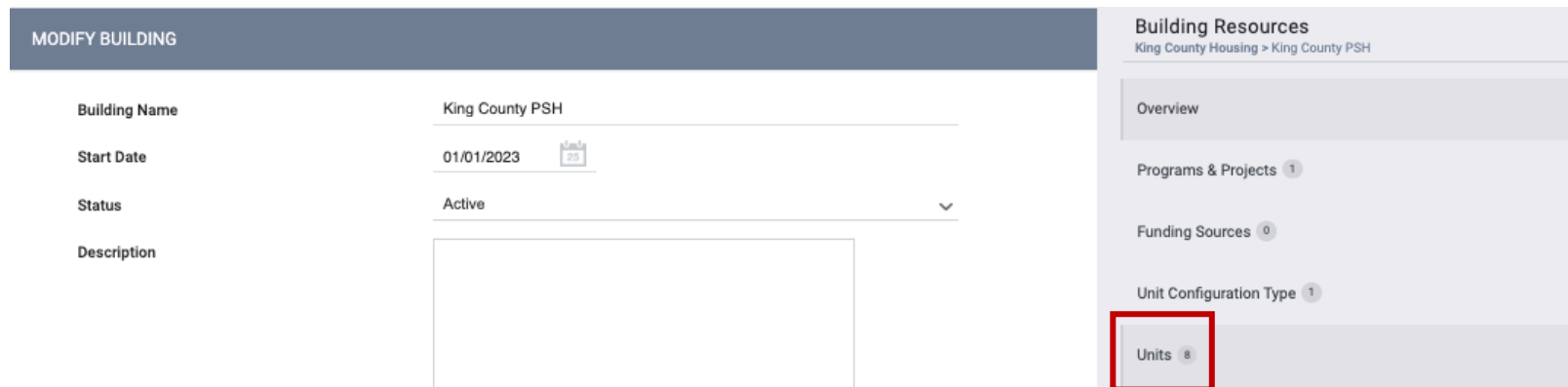
## Understanding Unit Referral Pathway Attribute Referral Pathway – Housing/ Shelter

You must select “*Coordinated Entry System*” for the specific units that receive referrals from Coordinated Entry when the Building CE Participation is “*Some units participate in CE.*”

- When “*When some units participate in CE*” is selected at the building level, the Coordinated Entry team will only know the specific units to refer to when “*Coordinated Entry System*” is selected as a Referral Pathway for the unit.



## How to Update Unit Attributes

1. Once you are in the Building (or Site for RRH Programs) that holds the Units you’d like to update, you will select “Units” underneath Building Resources.




2. Select the Edit icon of the unit you'd like to update where you will be able to update Unit Attributes.

**UNITS**


Unit Name	Unit Configuration Type	Beds	Availability
 Unit 101	PSH - Adult - 1 BR	1	Available
 Unit 102	PSH - Adult - 1 BR	1	Available


**MODIFY UNIT**

Unit Name: Unit 101

Unit Start Date: 01/01/2023 

Status: Active

Status Start Date: 01/01/2023 12:00 AM 

Status End Date: \_\_\_/\_\_\_/\_\_\_ :\_\_ AM 



# Edit Unit Status From the Inventory Map

## When would you do this?

You will edit a unit's status if an active unit needs to be taken offline or if an offline unit needs to become active.

## Understanding Active to Offline Unit Status

You would change a unit's status from active to offline for the following reasons:

1. Cleaning
2. Maintenance
3. Held for Mobility Transfer
  - a. Unit is being held for a mobility transfer from CE
4. Held for Internal Transfer
  - a. Unit is being held for an internal transfer within the agency
5. Staffing Capacity
  - a. Program is at capacity and cannot fill units
6. Bed Bugs
7. Meth or Drug Remediation
8. Fire Damage
9. Flood Damage
10. Isolation and Quarantine
11. Shelter Relocation
  - a. Shelter is moving locations
12. RRH Offline
  - a. Use this option for RRH extra slots as capacity shifts

## Understanding Offline to Active Unit Status

You would change a unit status from offline to active for the following reasons:

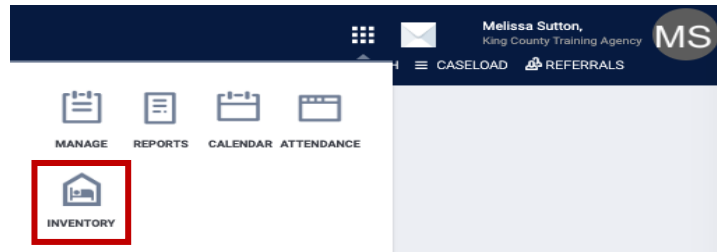
1. You need to end an auto Offline status early
2. You need to end a manually set Offline status.

## Important Reminders:

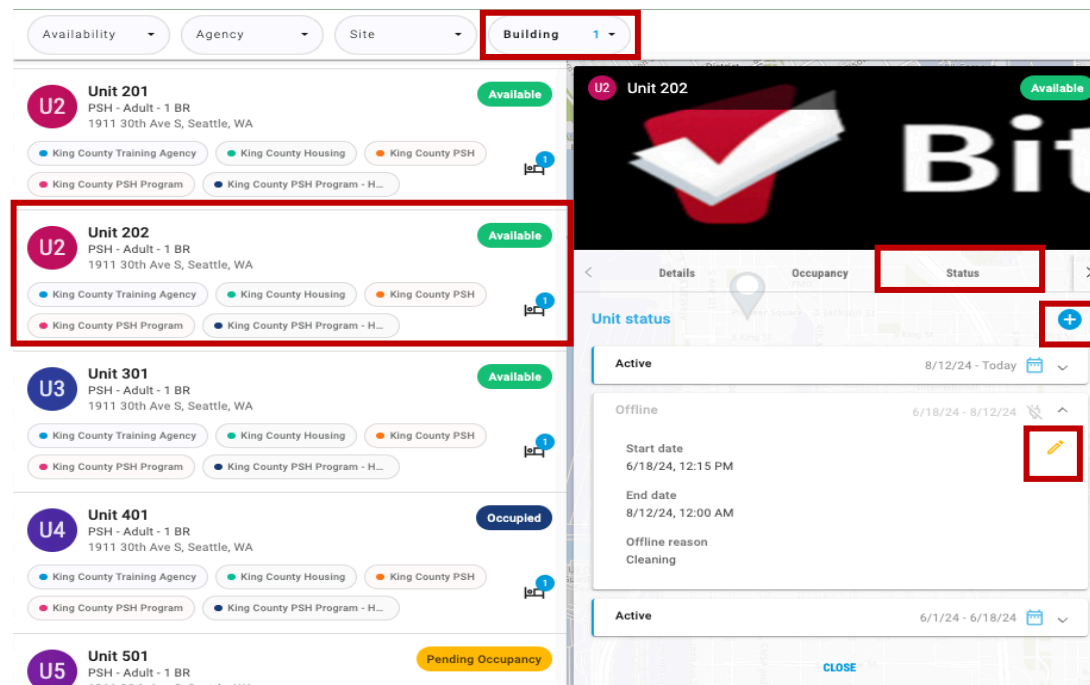
1. When a client exits from an enrollment, the associated unit immediately becomes available for referral unless you manually change the unit status to Offline, except for PSH programs.
2. **For PSH Programs:** Units automatically turn Offline for 7 days for cleaning and maintenance. However, you can end this Offline status early or keep the unit Offline for longer should you need. Please update the Offline Reason as appropriate.
3. You should never use an Inactive status. If you need to take a unit completely offline indefinitely, you will submit a [Project Change Request](#).

## How to Edit a Unit Status from the Inventory Map

1. Your user access role must have the following access rights enabled:
  - a. Inventory – Add Bed/Unit Status
  - b. Inventory – Edit Bed/Unit Status
2. Navigating to the Inventory Map



3. Identify the building/unit you wish to edit the status of and navigate to the status tab of the Unit card.



- a. If you do not see an “Add” symbol and/or an “Edit” icon for Offline Status’, you need to have your agency lead request this access from the Help Desk.

## How to Change a Unit Status from Active to Offline

1. From the unit card, navigate to the status tab and select the add icon
2. Select the status of "Offline," select the Offline Reason
3. Write an Offline description and select the date the offline status begins.
  - a. Offline start date can be in the past, present or future.
4. Indicate an end date to the Offline status if this is known
  - a. Offline end date can be in the past, present, or future.

The image illustrates the process of changing a unit's status from Active to Offline through four sequential screenshots:

- Unit Card:** Shows 'Unit 202' with status 'Available'. A red box highlights the plus icon in the 'Status' tab.
- New Status Modal:** Shows the 'New status' modal with 'Offline' selected. A red box highlights the 'Offline' option.
- Offline Reason and Date:** Shows the 'New status' modal with 'Offline' selected, 'Held for Mobility Transfer' as the reason, and '8/12/2024' as the start date. A red box highlights the 'SAVE' button.
- Updated Unit Card:** Shows 'Unit 202' with status 'Offline' and '8/12/24 - Today' as the status. A red box highlights the 'Offline' status and the date range.

**For PSH Programs:** Units automatically turn Offline for 7 days for cleaning and maintenance. However, you can end this Offline status early or keep the unit Offline for longer should you need. Please update the Offline Reason as appropriate.

## How to Change a Unit Status from Offline to Active

1. From the unit card, navigate to the status tab.
2. Select the dropdown arrow to the right of the current Offline Status and select the “Edit icon.”
3. Enter in the date and time you would like the unit’s Offline Status to end and press Save.
  - a. Offline start date can be in the past, present or future.
4. Confirm the Offline End Date.
5. You can view a unit’s status history under the status tab.

The image illustrates the process of changing a unit's status from Offline to Active through a mobile application. It consists of three sequential screenshots:

- First Screenshot:** Shows the unit card for 'Unit 202' with an 'Offline' status. A red box highlights the edit icon (a pencil) next to the status.
- Second Screenshot:** Shows the 'Unit status' edit form. The 'Offline' status is selected. The 'Offline reason' is 'Held for Mobility Transfer' and the 'Offline description' is 'Holding for mobility transfer from CE'. The 'Start date' is 8/12/2024 and the 'Start time' is 07:45 AM. The 'End date' is 8/16/2024 and the 'End time' is 09:00 AM. The 'End date' and 'End time' fields are highlighted with a red box. A red arrow points from the 'Edit status' button in the first screenshot to this form.
- Third Screenshot:** Shows a confirmation dialog with an information icon and the text: 'The Offline End Date is set to 8/16/2024 09:00 AM. This Unit will automatically become Active after the assigned 'Offline' period ends, and an Active status record will be added on 8/16/2024 09:00 AM if there are no future date unit status records that begin on that date.' The 'CONFIRM' button is highlighted with a red box. A red arrow points from the 'SAVE' button in the second screenshot to this dialog.

**Please note:** You cannot “Add” an active status in the same way you can “Add” an Offline Status. You can only end and Offline status which automatically sets the unit as Active.

# Update a Unit Configuration Type

## When would you do this?

You will update a unit configuration type if the following changes occur:

1. The unit is used by a different program
2. The unit increases bed capacity
3. The unit changes the Household Type it serves
4. The unit changes the Population Types it serves, such as:
  - a. Chronically Homeless
  - b. Veterans
  - c. Youth
  - d. Non-Dedicated

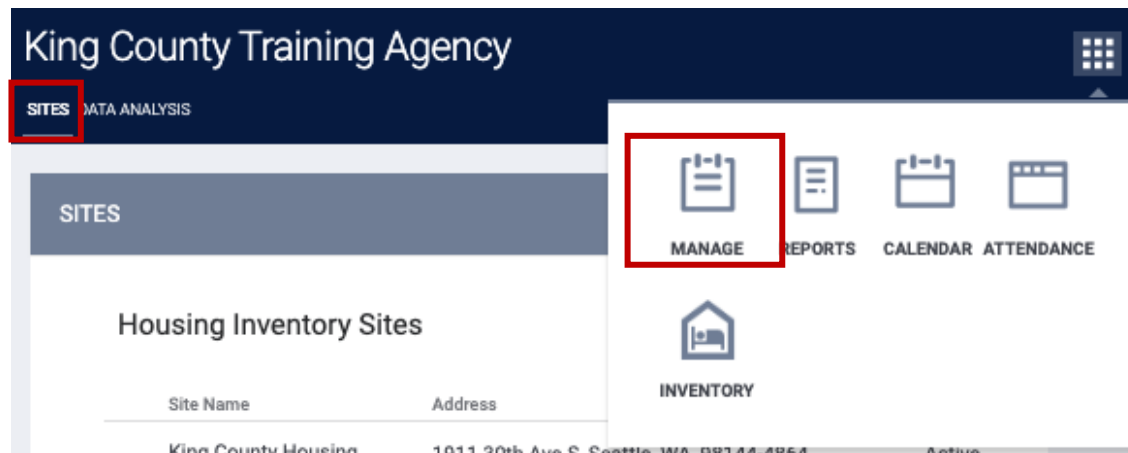
- e. Gender Specific

## Understanding Unit Configuration Types

While you can apply currently active Configuration Types, you cannot create new Unit Configuration Types. There have been many Unit Configuration Types created during the implementation process based on agency/program feedback. Should you determine your program needs a new Unit Configuration Type created, please submit a [Project Change Request](#).

## How to Update a Unit Configuration Type

1. Your user access role must have the ability to “Edit Sites - Administrative and Housing Inventory Entities” enabled.
  - a. If you don’t see “Manage” from your launchpad and/or the Sites tab, you need to have your agency lead request this access from the Help Desk.



2. After navigating to Manage>Sites, you will select “Housing Inventory” under Site Categories. From there you can Edit any of your agencies sites. Buildings are contained within Sites.

a. Please note, RRH programs do not have buildings - they only have Unit “Slots.”

The screenshot shows the 'SITES' management interface. On the left, a table titled 'Housing Inventory Sites' lists three sites. The first site, 'King County Housing', has an edit icon and an 'Edit' button highlighted with a red box. The table columns are Site Name, Address, and Status. On the right, the 'Site Categories' sidebar shows 'Administrative' and 'Housing Inventory', with 'Housing Inventory' highlighted by a red box.

Site Name	Address	Status
King County Housing	1911 30th Ave S, Seattle, WA, 98144-4864	Active
King County Shelter	157 S Jackson St, Seattle, WA, 98104-2852	Active
Seattle Harbor PSH	100 S King St, Seattle, WA, 98104-3844	Active

Site Categories

- Administrative
- Housing Inventory**

3. Navigate to Buildings & Units where you will be able to edit the Building.

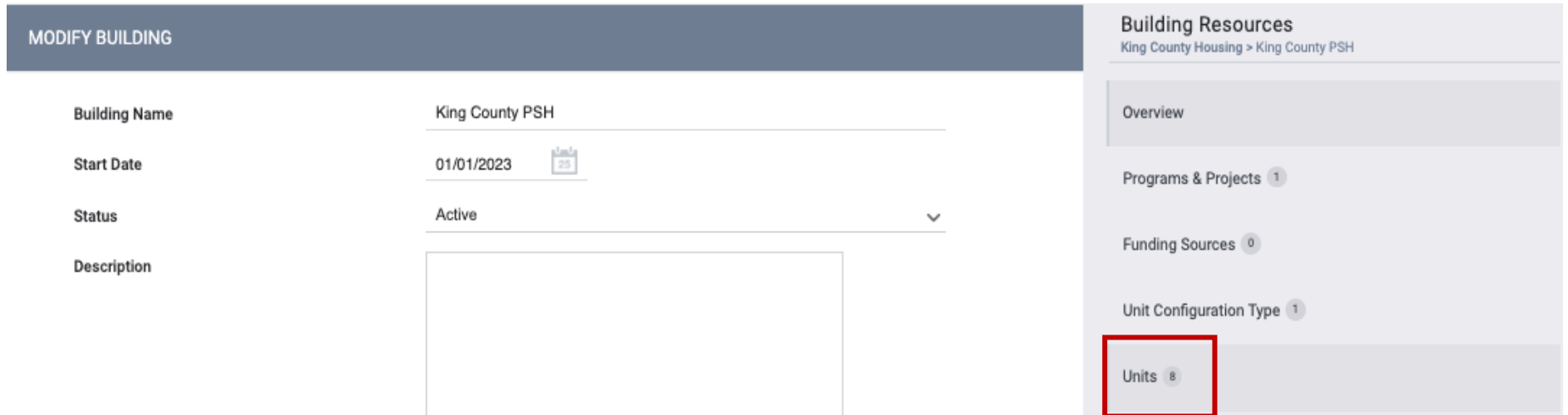
The screenshot shows the 'KING COUNTY HOUSING: BUILDINGS' management interface. On the left, a table lists one building, 'King County PSH', with an edit icon and an 'Edit' button highlighted by a red box. The table columns are Building Name, Description, and Status. On the right, the 'Site Resources' sidebar shows 'Overview', 'Programs & Projects 1', 'Buildings & Units 1' (highlighted with a red box), and 'Funding Sources 0'.

Building Name	Description	Status
King County PSH		Active

Site Resources

- Overview
- Programs & Projects 1
- Buildings & Units 1**
- Funding Sources 0

4. Once you are in the Building (or Site for RRH Programs) that holds the Units you'd like to update, you will select "Units" underneath Building Resources.



**MODIFY BUILDING**

Building Name: King County PSH

Start Date: 01/01/2023

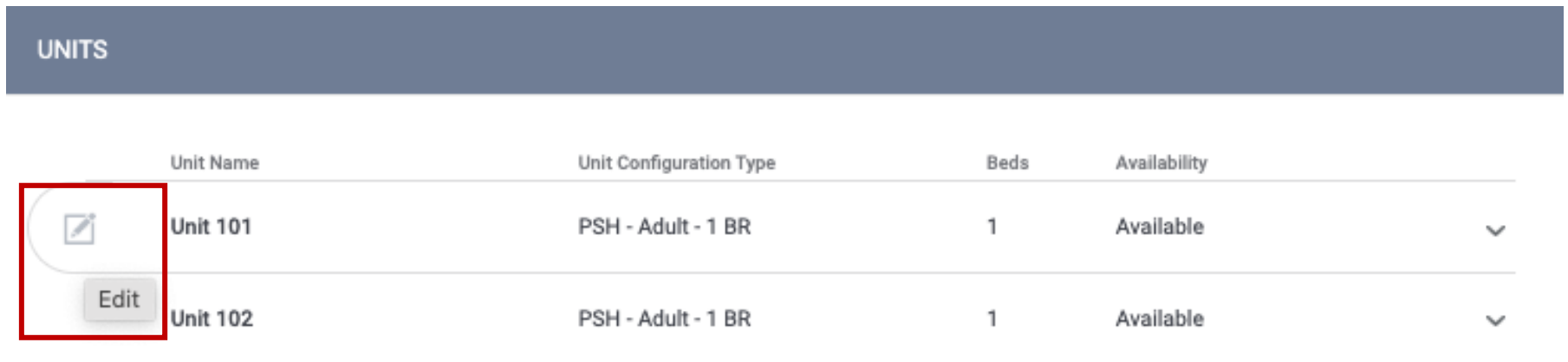
Status: Active

Description:

**Building Resources**  
King County Housing > King County PSH

- Overview
- Programs & Projects 1
- Funding Sources 0
- Unit Configuration Type 1
- Units 8**

5. Select the Edit icon of the unit you'd like to update where you will be able to update Unit.



**UNITS**

Unit Name	Unit Configuration Type	Beds	Availability
Unit 101	PSH - Adult - 1 BR	1	Available
Unit 102	PSH - Adult - 1 BR	1	Available

6. Scroll down to the “Unit Configurations” section of the Modify Units page where you will see active Unit Configurations.
7. You will select and drag the new Unit Configuration you would apply to the unit into the “Upcoming Configuration” section and indicate the date you would like this change to occur.
  - a. Unit Configuration start date can be in the past, present or future.

The screenshot displays the 'UNIT CONFIGURATIONS' interface. It is divided into several sections:

- UNIT CONFIGURATIONS** (Header)
- Current Configuration** (Section Header)
- Current Configuration Table:**

Unit Configuration	Beds	Start Date	Note	Program
PSH - Adult - 1 BR	1	01/01/2023		King County PSH Program
- Upcoming Configurations** (Section Header)
- Upcoming Configurations Table:**

Unit Configuration	Beds	Note	Program
PSH Adult - 1 BR	3		King County PSH Program

An 'ASSIGN UNIT CONFIGURATION' modal window is open, showing a calendar for August 2024. The 'As Of Date' field is highlighted with a red box. The calendar shows the date 19th of August is selected. A 'SAVE CHANGES' button is visible. Below the calendar, it says 'No results found'.

A red arrow points from the 'Available Configurations' section (the table with 3 beds) to the 'Upcoming Configurations' section (the table with 1 bed).



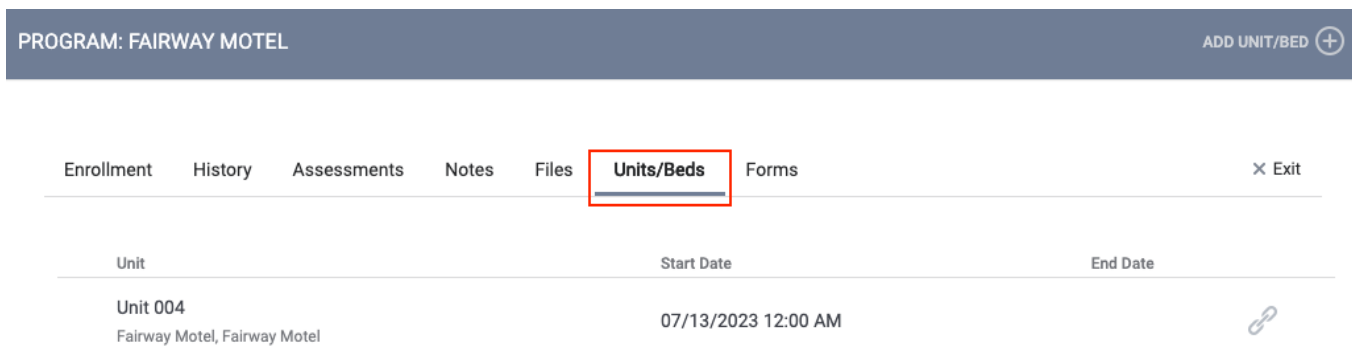
# Complete a Unit Transfer

When would you do this?

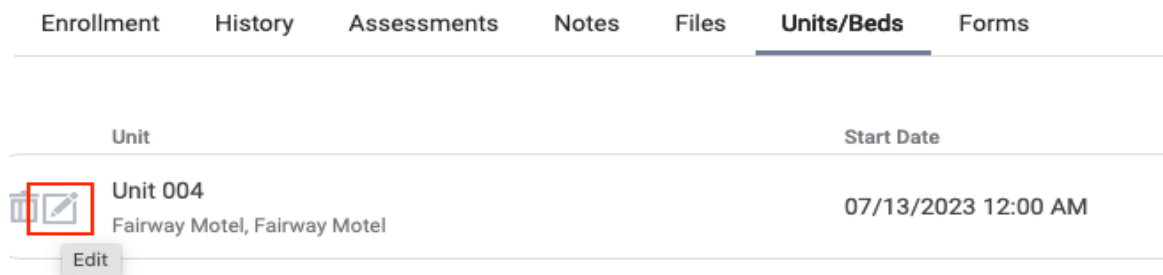
Clients may need to move to another unit due to reasonable accommodations, safety issues, unit repairs, etc. Follow these steps to transfer a client to another unit.

## How to Complete a Unit Transfer

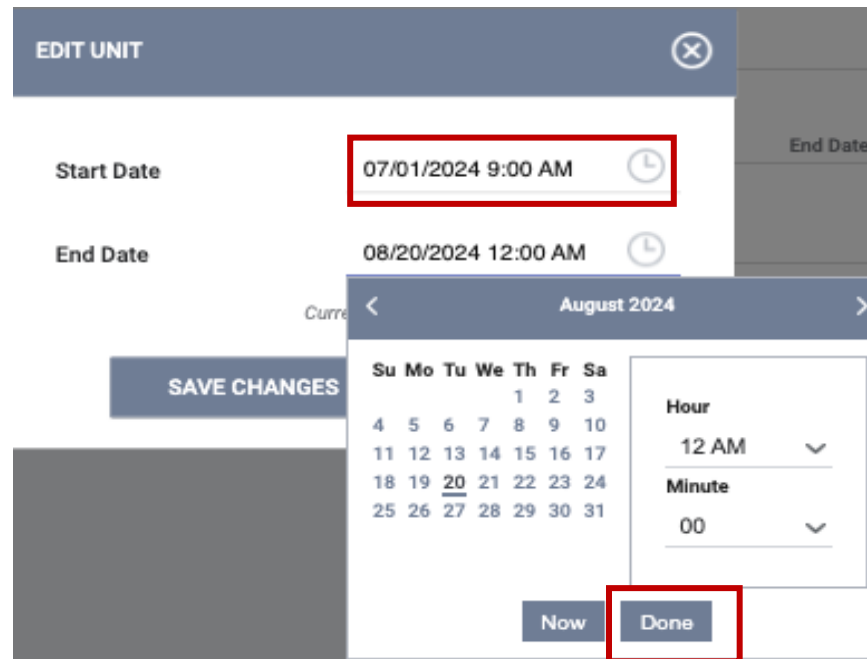
1. From the Program Enrollment, navigate to the Units/Beds Tab.



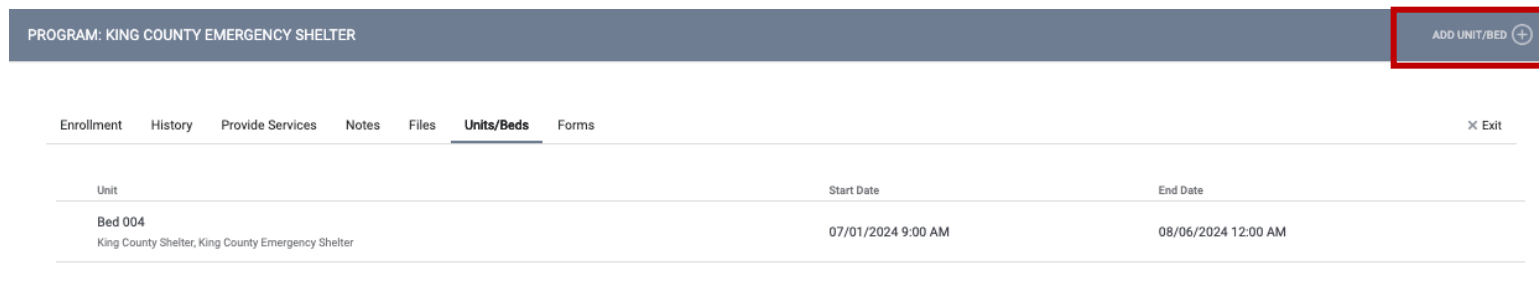
2. Click edit next to the current unit.



3. Add an End Date to the Current Unit.
  - a. The Unit End Date can be in the past, present or future.



4. Once you have ended the current Unit Stay, you must assign a New Unit to the Client by selecting “Add Unit/Bed



5. Assign the Client to the New Unit.
  - a. The Start Date should be the first night the client will sleep in the unit.
  - b. Always use Client Profile Only when selecting Unit Options.

**ADD UNIT/BED** ✕

**Start Date** 08/20/2024 8:45 AM 🕒

**End Date** 🕒

**Eligibility Override**

**Eligible For Partial Dates**

**Available Units/Beds** Select... ▼

- Client Profile Only
  - Bed 004 (King County Shelter, King Count

**ADD** **CANCEL**