



Clarity INVENTORY: Current State Analysis

TOPIC	QUESTION	RESPONSE
GENERAL	<input type="checkbox"/> Practicing INVENTORY configuration in your training instances will help eliminate errors that would be difficult to fix in your production instance. Do you currently have a training instance of Clarity Human Services?	
	<input type="checkbox"/> INVENTORY relies on accurate data so it's important that providers are keeping program information up-to-date. Describe how your shelter and housing providers are currently entering data into HMIS.	
HOUSING/SHELTER PORTFOLIO	<input type="checkbox"/> Your current process for collecting new program information may need to be updated when using INVENTORY. It's also recommended that you have a standard method to ensure all necessary information is obtained. Describe your current process for collecting new program information from providers.	
	<input type="checkbox"/> If you're not interested in setting up INVENTORY for your entire housing portfolio, consider system impacts as you make decisions about INVENTORY. Are you interested in setting up INVENTORY for your entire housing portfolio?	
	<input type="checkbox"/> Knowing the scope of units will help you determine whether configuration should be completed manually or through a migration. How many units are you estimating will need to be configured as part of INVENTORY?	
	<input type="checkbox"/> INVENTORY provides many configuration options, including the ability to set up multiple buildings under one site or connect units within one building to multiple programs. Identifying these buildings will help you make informed configuration decisions. Do you have any buildings that have multiple programs within one building?	
	<input type="checkbox"/> Unit Configuration Types provide the flexibility needed to update unit funding sources as they change. Do you have any units that change funding sources?	

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SHELTER	<ul style="list-style-type: none"> <input type="checkbox"/> In many communities, shelter workflows differ from housing workflows. Identifying what projects will use INVENTORY allows you to ensure workflow revisions are made for all project types. Do you have an interest in setting up INVENTORY for shelter programs? <input type="checkbox"/> It's important to use a naming convention for units and beds that aligns with the way shelters reference the units or beds. If unit and bed determinations are made after a referral is sent, you may want to consider using program referrals and assigning clients to unit and beds manually after the determination is made. Describe how shelter staff identify which unit or bed a client will be assigned to. 	
ELIGIBILITY CRITERIA	<ul style="list-style-type: none"> <input type="checkbox"/> If program-level eligibility criteria is already configured, this can be incorporated into your referral workflow. However, there may be a desire to get more granular using unit or bed level eligibility criteria. Do you have eligibility criteria set up for any programs in Clarity? Eligibility criteria can be connected to any level of INVENTORY. 	
REFERRALS	<ul style="list-style-type: none"> <input type="checkbox"/> INVENTORY can be used in conjunction with various referral methods. Determine whether your community will make referrals to units from the Community Queue or consider a new referral method like the Unit Queue. Describe your current referral process for housing. Does it include sending referrals through the Community Queue? <input type="checkbox"/> INVENTORY allows you to connect clients to units directly or as a result of a referral. Consider what workflow solution is best based on current practices. Describe your current referral process for shelter. Is there a centralized process? <input type="checkbox"/> Understanding your matchmaking process will help you make informed recommendations and decisions about incorporating INVENTORY. Describe your matchmaking process. 	

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REPORTING	<ul style="list-style-type: none"> <li data-bbox="457 272 1539 375"> <input type="checkbox"/> It's important to identify any reports that may need to be updated when transitioning to using INVENTORY. Describe any reports that matchmakers use to see unit or program availability. <li data-bbox="457 407 1549 509"> <input type="checkbox"/> INVENTORY includes a specific program-level setting that must be enabled for INVENTORY records to be used for reporting. Would you like INVENTORY records to be used for reporting such as the HIC? 	
AVAILABILITY	<ul style="list-style-type: none"> <li data-bbox="457 586 1549 834"> <input type="checkbox"/> Communities may need to stop using the Availability Form once the Bed & Unit Management toggle is enabled. Programs may need to transition to INVENTORY or you may need to update workflows for programs that won't utilize the new functionality. <i>Bitfocus is planning to introduce functionality that will allow you to control INVENTORY at the program-level. This will allow you to use INVENTORY functionality for specified programs and continue use of Availability for others, if desired.</i> Is your community currently using Limited Availability to post openings? <li data-bbox="457 867 1461 969"> <input type="checkbox"/> INVENTORY has a built in dashboard that provides real-time availability and occupancy information. Describe how matchmakers are made aware of unit openings. 	
ACCESS ROLES	<ul style="list-style-type: none"> <li data-bbox="457 1045 1549 1110"> <input type="checkbox"/> Access roles will need to be updated or new roles created to provide users access to INVENTORY. How many access roles do you currently have? <li data-bbox="457 1143 1535 1279"> <input type="checkbox"/> Users provided "manage access" to INVENTORY will require an access role using a sys admin or manager license. Communities should determine who needs this level of access and purchase additional licenses, if needed. How many manager licenses do you currently have? 	