Clarity INVENTORY: Decision Making Guide

The Clarity INVENTORY Decision-Making Guide outlines the settings that are available and what they control. Following the decision-making guide will ensure you discuss all critical settings and allow you to track your progress along the way.

SETTING	BRIEF DESCRIPTION	DECISION
System-Level Settings		
[Bed & Unit Management Toggle](#)	This enables the ability to make referrals to units from the *Unit Queue* or the *Community Queue*. When enabled, you can no longer post program openings under *Limited Availability*.	☐ Disabled ☐ Optional ☐ Required
[Default Bed & Unit Management Value](#)	This setting only appears when *Bed & Unit Management* is set to optional. When enabled, the program-level *Bed & Unit Management* toggle will be ON, but edibles for all programs in the *Referral Setting*.	☐ Enable ☐ Disabled
Program-Level Settings		
[Bed & Unit Management](#)	If Bed & Unit Management under Referral Settings is set to Optional, you need to determine which programs need the ability to refer to Units and Beds from the *Unit Queue* and *Community Queue*. You may need to enable this setting for specific programs unless the default value has been enabled. *Program will no longer post program openings under Limited Availability.*	☐ Identify list of programs that need this enabled
[INVENTORY Calculated Records](#)	This is a program setting that tells the system to use INVENTORY records for reports like the Housing Inventory Count (HIC). INVENTORY records should be the most up-to-date and accurate bed and unit information. Bitfocus recommends enabling this for programs using INVENTORY.	☐ Enable ☐ Disabled
[Manage Units Toggle](#)	When enabled, you can assign clients to units for this program. Consider enabling this for all programs using INVENTORY.	☐ Enable ☐ Disabled
[Direct Unit/Bed Referrals](#)	When enabled for a program, the option to associate referrals with a Unit or Bed is available via the client-level referrals tab and the *Eligibility Determination Screen*.	☐ Disabled ☐ Optional ☐ Required
Site Specific Settings		

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[Automatic Offline Status](#)	The system automatically creates an offline status for a unit/bed when a client exits. This setting is more applicable for housing due to the time it takes to turnover a unit when someone moves out. *Can be enabled at the site, building, UCT, unit, or bed level.*	☐ Enable/ Level_____ ☐ Disable
[Prohibit Eligibility Override](#)	This setting should be used when programs have strict eligibility criteria, and you want to prevent users from overriding any eligibility criteria that has been configured.	☐ Enable under Referral Settings ☐ Enable for individual Sites
Dashboard Access		
[Staff Inventory Access](#)	This setting controls which units an **agency** will see on the INVENTORY dashboard. Bitfocus recommends only giving agencies access to their own units unless the agency is the CoC lead or manages a system-level program. Providers prefer the usability of the dashboard when they don't have to filter out information from other agencies.	☐ Agency ☐ Coordinated Entry Type ☐ System
[Inventory Access](#)	This controls what units a specific **user** sees on the INVENTORY dashboard. This setting overrides the *Staff Inventory Access* on the agency overview page. Users such as matchmakers may need a different level of access from others at their agency due to their responsibilities.	☐ Determine if any staff need a different level of access than their home agency.
Custom Fields		
[Offline Reason Picklist](#)	Units can be taken offline at any time due to repairs, cleaning, and more. The picklist responses should be customized for each community.	☐ Picklist responses have been decided
[Custom Dashboard Filters](#)	Custom filters can be used to refine what information is displayed on the INVENTORY dashboard. Communities should determine who is the audience for the dashboard and then add fields those users will find useful. *Only picklist and checkbox fields can be added as filters.*	☐ Add custom filters ☐ Do not add filters
[Dashboard Display cards](#)	Custom fields can be added to the display cards to show additional information about a site, building, unit, or bed. Be selective about what information is added so the display cards don't become overwhelming to read.	☐ Enable fields on display cards ☐ Leave disabled