Clarity General Training Outline

Lesson One - Login Page and Two Factor Authentication (2FA)

Covered topics:
- Log-in page
- Two factor authentication (2FA)
- Locked out

Key points:
- Username and Password are entered on this page.
- The Forgot Password link, if enabled by a system administrator, allows you to reset your password via email.
- You may be locked out for 1-5 hours after multiple failed login attempts.
- 2FA authentication is possible through email or with a mobile authenticator app depending on system settings.

Lesson Two - User Policy

Covered topics:
- Why you might have a user policy
- List requirements that your community may have
- Show examples of what you might be agreeing to

Key points:
- The User Policy contains legal restrictions around client information, protecting the client and their information.
- User policy enforcement is up to individual communities, and you may be required to sign a user User Policy Agreement at system entry.

Lesson Three - Homepage and Launchpad

Covered topics:
- Explain the launchpad icon
- Navigate the homepage
- Return to the homepage

Key points:
- The Launchpad icon is 9 squares in the top right corner of the page. This is how users navigate to different parts of the system.
- The Homepage is the Search page.

Lesson Four - Account Settings

Covered topics:

- Navigate to account settings
- Change account settings
- Explain account settings

Key Points

- Access account settings by clicking the initials in the top right corner of the page.
- You can upload or take a profile photo, and update your name, email, and password on this page.

Lesson Five - Mailbox, Reports, and Calendar

Covered topics:

- Use Clarity Human Services Mailbox Feature
- Create and explore a report
- Use the Clarity Human Services Calendar

Key points:

- Securely communicate with other Clarity users in your system through the Mailbox (letter icon in the top right of the screen)
- Mailbox functions similarly to email.
- Reports are accessible through the link in the launchpad.
- To run a report, click run and select the desired parameters. Results can be produced in web page, excel, or pdf form.
- Open the report through the link in the report pop-up window.
- Calendar is accessible through the launchpad. View and delete appointments through the calendar.

Lesson Six - Attendance Services

Covered topics:

- Explain attendance-based services
- Navigate to attendance-based services
- Demonstrate how to provide the service
- Explain the difference between manual and scanned provision of those services

Key points:

- Attendance-based services are typically provided daily or multiple times per day.
- Clients can be scanned in or manually entered into the system using the Attendance module.

Lesson Seven - Main Screen, Client Search, and Caseload 3 min

Covered topics:

- Fully navigate the homepage
- Search for a client
- Work in the caseload tab

Key Points

- Agency name appears in the top left of the home page.
- To search for a client, enter at least 3 letters of the first and last name. DOB and SSN can be verified from the search page. If duplicates are identified, notify a system administrator.
- The Caseload tab will show clients that are part of a user's active caseload and clients with an annual assessment coming due.

Lesson Eight - Existing Client Profile

Covered topics:

- Navigate the client profile
- Locate client level reports, calendars, and privacy settings

Key points:

- Open a client profile by clicking the edit button next to the client's name in the search bar.
- Household members, active programs, recent services, and assigned staff all appear on the right side of the screen.

Lesson Nine - Managing Households

Covered topics:

- Create a household
- Manage a household
- Exit a client from a household group

Key points:

- Household members help speed up enrollment and services when group services are available.
- The client you start managing the household with will be set to the head of household by default and will be marked by a star. This can be edited if the head of household changes.

Lesson Ten - Client Reports and Client Appointments

Covered topics:
- Run client level reports
- Print a scan card
- Set client appointments in the calendar

Key points:
- Client reports can be accessed through the printer icon in the client profile.
- Appointments can be scheduled with the client by clicking the calendar icon and entering the information. Appointments will show up on your user calendar as well.

Lesson Eleven - Privacy Shield/Release of Information, History

Covered topics:
- Locate and explain privacy shield
- Search client history

Key points:
- Client privacy can be adjusted from public to private by clicking into the privacy shield from the client profile.
- You can also add, view, and modify saved ROIs in this section. Multiple ROI's cannot overlap in date.
- The client history will show enrollments, services, and referrals. Use filters to search through a long history as needed.

Lesson Twelve - Creating a Client, Dynamic Fields, and Release of Information

Topics covered:
- Create a client
- Describe the intake process
- Collet an ROI

Key points:
- Avoid duplication when creating clients.
- Dynamic fields (fields that generate or hide depending on the responses to other fields) help save time in the long run.
- An ROI may be required to create a client record depending on your system setup. Select the documentation type depending on community guidelines when creating an ROI.
- Data that was missed will be highlighted in red when you try to save the record.

Lesson Thirteen - Enrolling Households, Notes & Public Alerts, and Files & Forms

Topics covered:

- Create and enroll households
- Add notes at program levels
- Add public alerts
- Upload client intake forms

Key points:

- Program enrollments for households help streamline data entry. Toggling on all household members who should be included in the enrollment will automatically prompt you to enter enrollment information for each after saving the HoH enrollment.
- Notes pertaining to the program enrollment can be added in the notes tab. Be sure to follow community guidelines for PII.
- Public alerts (client notes tab) will create a notice banner visible to other users in the system when they view this client's record.
- Forms and files can be entered or uploaded in several different ways. Follow community guidelines to ensure forms and files are being saved in the appropriate locations.

Lesson Fourteen - Providing Services, Location, and Contact

Topics covered:

- Compare client and program level services
- Log a service provision
- Add a client location

Key Points

- Services can be provided to clients at the client level or within a program enrollment.
- Location information is most useful for outreach-related programs and services. Consult with system administrators or agency managers for policies related to when it's appropriate to capture client location data.
- Active and past contact information can be added in the Contact tab.

Lesson Fifteen - Status and General Assessments

Topics covered:

- Contrast status and general assessments
- Provide a status assessment
- Provide a general assessment through Program or Assessment tab

Key points:

- Status assessments are provided through a specific program enrollment.
- Find the Status assessment in the assessments tab of program enrollment or on the right side of the screen when editing a client program enrollment.
- General assessments can collect data at the client level, or assessments can also be completed at the program enrollment level.

Lesson Sixteen - Client History and Exiting a Program

Topics covered:

- Explain difference between client and program level history
- Exit a client or group from a program

Key points:

- Client history can be filtered by many filter options. Program-specific history can also be viewed within program enrollments.
- To exit a client from a program, enter the program enrollment and click exit. Be sure to fill out all appropriate information for all members of the household who are exiting the program.