This decision log highlights key decision points you’ll reach as you set up Clarity Human Services in your community. This document guides you through key decision points, informs your planning process, and serves as a record of what decisions were made, how conclusions were reached, and who were the key stakeholders and approvers.

***Directions:*** *Work with your team to set* ***Target Dates*** *and identify the key* ***Stakeholders and Approvers*** *for each decision point. Use the* ***Decision Made & Rationale*** *and* ***Relevant Links & Documents*** *sections to record key information about what decision is made and its rationale. Use the* ***Date Completed*** *section to log when decisions are finalized.*

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| Plan Your Workgroup | | | | | |
| DECISION POINT | TARGET DATE | STAKEHOLDERS & APPROVERS | DECISIONS MADE & RATIONALE | RELEVANT LINKS & DOCUMENTS | DATE COMPLETED |
| **Determine stakeholders needed for onboarding oversight**  *The Bitfocus Onboarding Roles & Responsibilities document outlines the recommended project support and expertise needed for onboarding.* |  |  |  |  |  |
| **Identify decision domains & assign responsible staff** *Ensure you have the right stakeholders in your workgroup to support each decision domain. Assign responsible staff to the roles outlined in the Roles & Responsibilities document.* |  |  |  |  |  |
| **Determine decision making process and method of documenting**  *Developing a process for decision making and documentation of decisions supports transparency and can be a valuable future reference.* |  |  |  |  |  |

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| Plan Your Project and Goals | | | | | |
| DECISION POINT | TARGET DATE | STAKEHOLDERS & APPROVERS | DECISIONS MADE & RATIONALE | RELEVANT LINKS & DOCUMENTS | DATE COMPLETED |
| **Determine preferred Go-live timeframe**  *Bitfocus recommends at least 6 months from project launch to Go-live for customers who will be migrating data.* |  |  |  |  |  |
| **Determine overlap with previous vendor**  *Bitfocus recommends at least 3 weeks of overlap with your previous vendor to assist with migration validation and any additional reporting needs.* |  |  |  |  |  |
| **Determine vendor extension options**  *It is best to know your vendor's options for an extension in case you require additional time in your legacy system.* |  |  |  |  |  |
| **Determine data set for migration. How many years of data will be migrated and does your migration include both HUD and custom data?**   *Most Bitfocus customers migrate between 5-7 years of data from their legacy system, depending on reporting requirements. Bringing over additional older data may compromise data quality.* |  |  |  |  |  |

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| Engage Your Community | | | | | |
| DECISION POINT | TARGET DATE | STAKEHOLDERS & APPROVERS | DECISIONS MADE & RATIONALE | RELEVANT LINKS & DOCUMENTS | DATE COMPLETED |
| **Determine stakeholder needs during the transition period.**   *Use the Stakeholder Map to identify key stakeholder groups and determine their needs. Investing time in this process helps make engagement more efficient and impactful for stakeholders.* |  |  |  |  |  |
| **Develop communication plan & assign responsible staff** *Develop a plan for communicating with stakeholders based on the findings of the Stakeholder Map. Be sure to include touchpoints throughout the process so all stakeholders are well-informed throughout the transition.* |  |  |  |  |  |

| Plan Technology Solutions | | | | | |
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| DECISION POINT | TARGET DATE | STAKEHOLDERS & APPROVERS | DECISIONS MADE & RATIONALE | RELEVANT LINKS & DOCUMENTS | DATE COMPLETED |
| **Determine system security features. What level of authentication will be required?**  *Clarity comes equipped with IP Global Whitelisting and 2 Factor Authentication options.* |  |  |  |  |  |
| **Determine sharing policies & procedures**. **How much information should be shared across agencies?**  *HUD encourages communities to move towards open sharing. Clarity comes equipped with flexible sharing options to support your community's needs.* |  |  |  |  |  |
| **Determine consent refused policy. How will your community respond to clients who refused consent for HMIS entry?**  *Clarity offers a consent refused feature that anonymizes the client records.* |  |  |  |  |  |
| **Determine custom report needs. What reports are you using in your current system? What custom reports need to be developed and what are the priorities for development?**   *Clarity’s Report Library is pre-configured with all required HUD reports and additional administrative, agency-management, and client-level reports. Clarity’s Data Analysis Tools can be used to develop additional custom reports.* |  |  |  |  |  |
| **Identify decision makers for coordinated entry setup in Clarity. Determine coordinated entry goals and priorities, including assessments, community queues, eligibility, and reporting.**  *Clarity supports* [*four coordinated entry models*](https://www.bitfocus.com/hubfs/CE%20Data%20Standards%20Readiness%20rev%202023-10-06.pdf) *and offers features that help automate your coordinated entry workflow and processes.* |  |  |  |  |  |
| **Determine what supports your community will need to implement coordinated entry in Clarity.**   *An overview of coordinated entry functionality and configuration is included in onboarding. Additional professional services are available if more assistance is required. Additional services can include needs analyses and recommendations, report building, configuration, training series, and more.* |  |  |  |  |  |

| Onboarding with Bitfocus | | | | | |
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| DECISION POINT | TARGET DATE | STAKEHOLDERS & APPROVERS | DECISIONS MADE & RATIONALE | RELEVANT LINKS & DOCUMENTS | DATE COMPLETED |
| **Define your onboarding project team** *Your onboarding project team should be composed of key decision makers and system administrators. It may include the same members of your planning committee or include other staff.* |  |  |  |  |  |
| **Determine decision making process for configuration decisions.**  *Determine how configuration decisions will be made and by whom. It’s important for all parties to be clear on the decision-making structure.* |  |  |  |  |  |
| **Determine configuration plan. Who will manage system configuration and how much capacity is required?** *Bitfocus estimates that a mid-sized system with 60 agencies and 400 programs requires 60 hours to configure. If a community wants to go-live with custom configuration, additional time may be required.* |  |  |  |  |  |
| **Determine naming conventions for agencies & projects.** *A vendor transition represents an opportunity to better align your agency and project naming conventions. Legacy naming conventions can be stored as an alias.* |  |  |  |  |  |
| **Determine what level of evaluation is needed for the current data set.** *It is important to have a strong understanding of your data set and data quality prior to migration. Determine what level of review and evaluation is needed before onboarding begins.* |  |  |  |  |  |
| **Determine key decision makers for data quality transformation decisions.** *Bitfocus offers data transformations to automate data quality corrections. It’s important to include stakeholders who are familiar with the data set and data standards to aid in decision making.* |  |  |  |  |  |
| **Determine if any projects should be consolidated during the Clarity transition.** *During the migration process, agencies and projects can be easily consolidated. Determine if any projects need to be consolidated in Clarity.* |  |  |  |  |  |
| **Determine blackout period methods and documentation needs. What processes will your community follow during the blackout period?**  *The blackout period is a time when you are no longer entering in your legacy system and don’t yet have access to your new Clarity system. Blackout is estimated between 5-10 days depending on the amount of data you are migrating to Clarity.* |  |  |  |  |  |

| Go Live with Clarity & Beyond | | | | | |
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| DECISION POINT | TARGET DATE | STAKEHOLDERS & APPROVERS | DECISIONS MADE & RATIONALE | RELEVANT LINKS & DOCUMENTS | DATE COMPLETED |
| **Determine who will train users on Clarity. What materials are needed to support users during onboarding?** *Bitfocus offers Clarity Courses for new users that can be purchased to supplement user training. We recommend that communities develop local materials to train users on community-specific workflows and processes.* |  |  |  |  |  |
| **Determine how training will be delivered to users and how users will be granted access to the system.** *Bitfocus recommends that all new users complete training before being provided access to Clarity. Determine what training requirements need to be put into place and how access to the system will be managed.* |  |  |  |  |  |
| **Determine how users will access technical support for Clarity.**  *It is important that new users have clear instructions and methods for accessing HMIS support. What processes are needed for users to access technical support in Clarity?* |  |  |  |  |  |