

End User Guide for



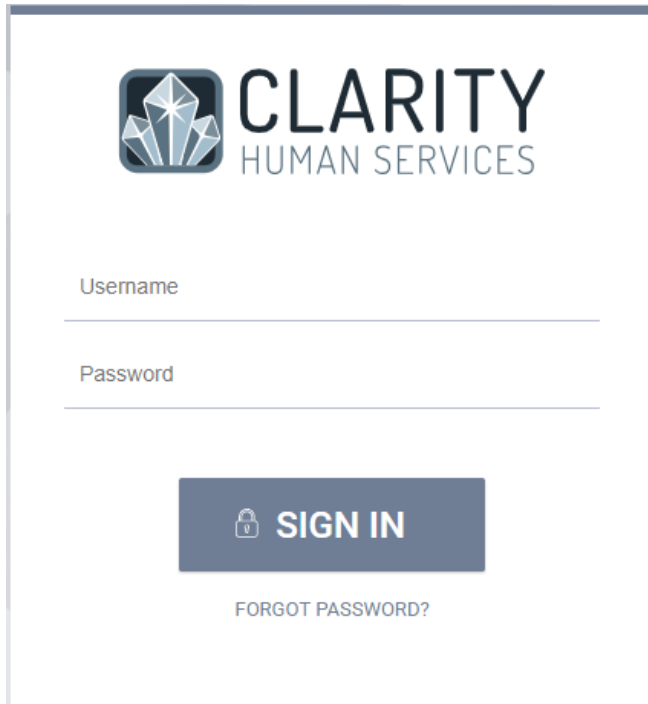
Updated February 2023

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1. Logging In


Go to the Clarity Human Services website at <https://cohmis.clarityhs.com/>



CLARITY
HUMAN SERVICES

Username

Password

 SIGN IN

FORGOT PASSWORD?

Clarity users require a unique username and password. Your username will be assigned to you. Usually it will be your agency's acronym followed by your first initial and last name i.e., ABCjSmith. The first time you log in, you should use the "Forgot Password" link to set your password for the first time. It must meet the following criteria:

- 8-9 characters in total length
- Contain upper- case letters (i.e., H)
- Contain lower-case letters (i.e., h)
- Contain Numbers (i.e., 9)
- Contain a special character
- Does NOT contain any portion of the user name
- Does NOT contain the word Clarity

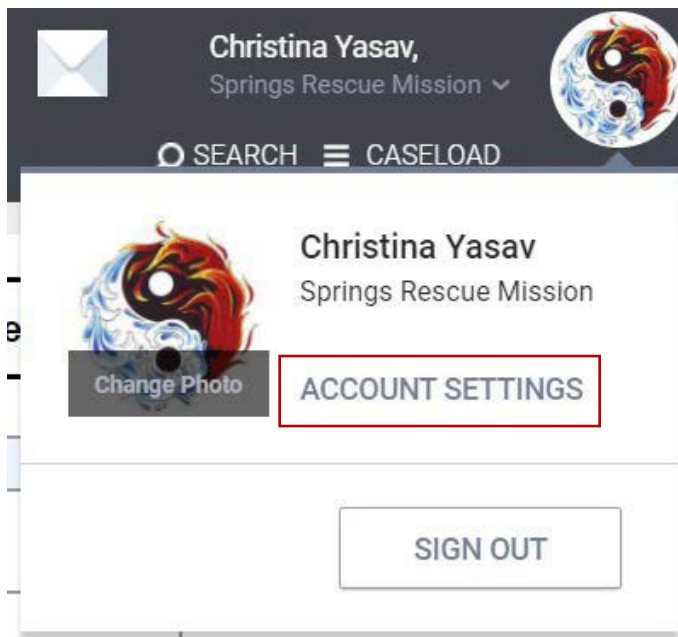
Example of an acceptable password:
S@mp1eP12

Do not share your account. Everything in the system is tracked. Every change that is made is traceable. You, as the user, are solely responsible for what happens under your account. Do not share.

Each HMIS user is also required to submit a signed receipt of privacy notice/user policy during their first login to Clarity.

2. Account Management

Clicking on your Avatar in the top right corner of the screen will allow to you get to your account settings.



In the account settings, you can change your password, set your telephone number, and set up your assessment due warnings. Please do not change your name or email settings yourself- put in a ticket with your CoC if you need to change this information.

Setting Assessment reminders: If your program requires periodic assessments, you can ask Clarity to send you an email when you have a client nearing an assessment due date. You can customize how much advance notice you get using the correlating drop down menu.

Enable 2FA



Assessment Due Warning



1 Day



1 Day

2 Days

5 Days

1 Week

2 Weeks

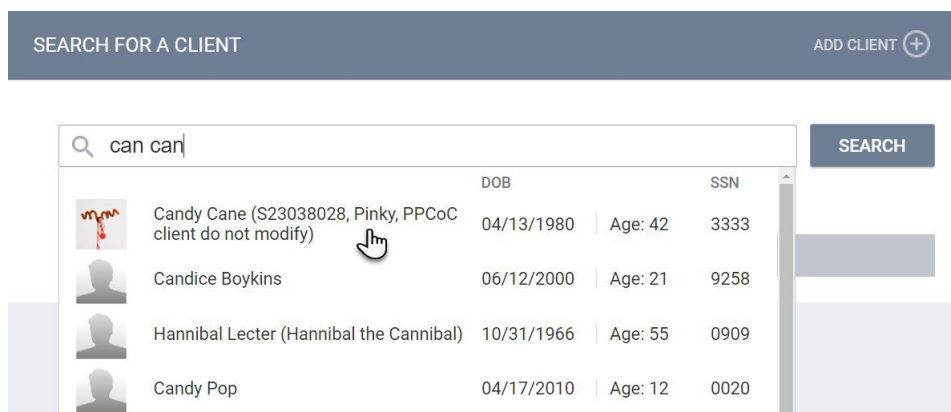
30 Days

3. Searching for a Client

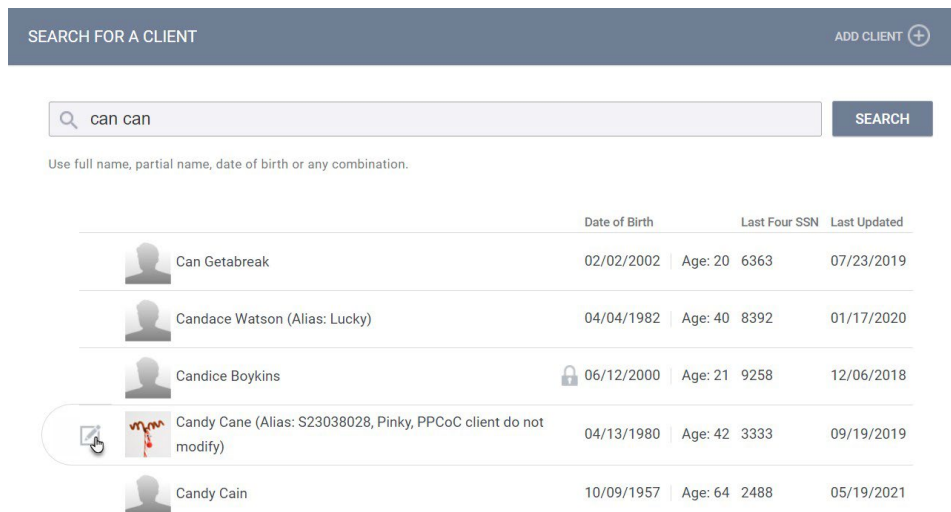
Before entering a new client, you must search to ensure that the client does not already exist in the database using a combination of the following client information:

- Name or alias
- SSN
- Date of Birth

You can use partial information to prevent false negative results. For example, if you are searching for Candy Cane, entering "can can" in the search field makes it much easier to find the correct client. If you searched "candee" instead of "candy" the result would not populate. Note that Clarity will try to populate results as you type, and you can click on the correct client as soon as they show in the pending results dropdown.

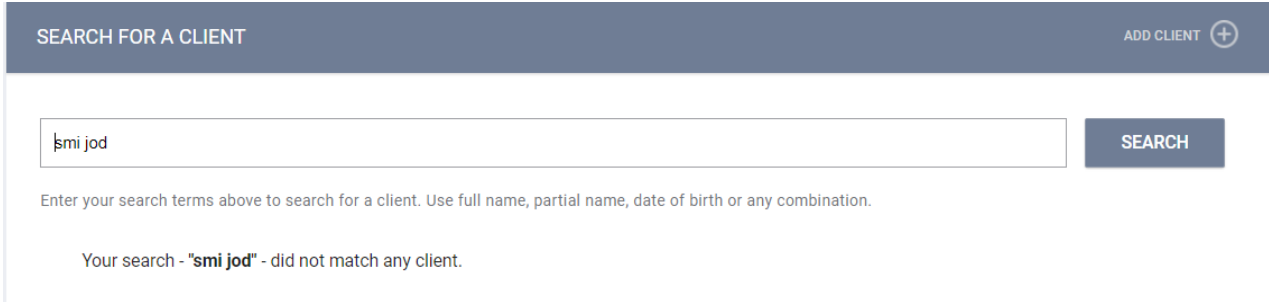


You can also enter your search terms and either click the search button or press enter on your keyboard. To select a client from your search results, hover your mouse pointer over the client you would like to select to produce an "Edit" option.



4. Adding A New Client

If, after a thorough search, you have determined that your client does not exist in HMIS, click the plus sign next to the words "Add Client" in the upper right corner of the Search screen.



SEARCH FOR A CLIENT ADD CLIENT +

smi jod SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Your search - "smi jod" - did not match any client.

In this example, we are entering client Jody Smith. Complete ALL fields on the following Intake screen with the proper responses and click "Add Record" at the bottom of the page when you are finished. All fields REQUIRE complete data. If any of the required HUD Universal Data Elements have been left blank, you will be unable to save/create the file. These fields will be highlighted in red for your attention. Complete the missing fields and click "Add Record" to create the file.

Don't Know/Refused/Data Not Collected:
Selecting "Don't Know", "Refused", or "Data Not Collected" is acceptable and will allow you to save the file. However, each field on this screen makes up the overall data quality percentage for this client. Not making a valid selection in each field will lower the data quality for this client and impact overall data quality percentages for your agency as a whole.

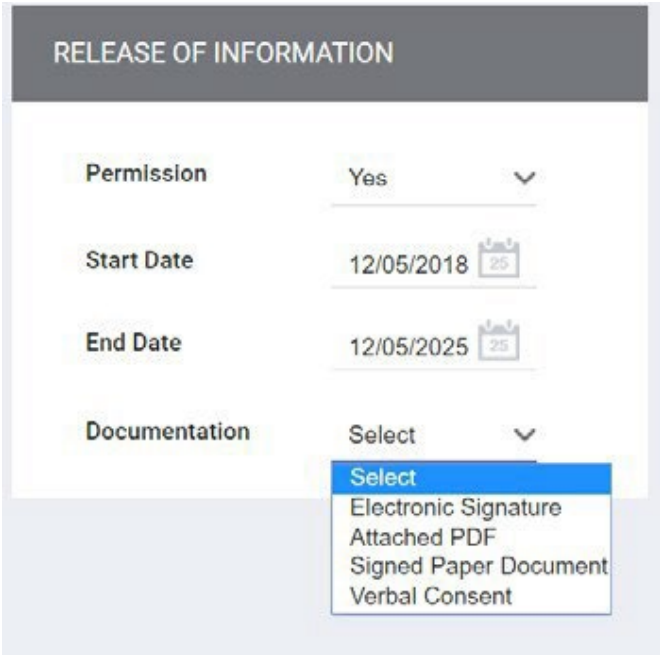
5. Release of Information

A Client Consent to Data Collection and Release of Information (ROI) must be completed for each client who consents to have their personally identifying information (PII) entered into the Colorado HMIS System. Each child must have the consent status documented in the system separately even though the parent can list all of their children on one paper form.

Acceptable Consent type is determined on a program by program basis. Written consent needs to be documented in the client profile. The form can be stored three ways:

- Electronic: A client can consent by reviewing and signing the ROI form electronically in HMIS.
- Hard copy upload: A client can consent by reviewing and signing a paper version of the ROI and having the service provider scan and upload the signature page into the HMIS. A PDF version of the ROI form for printing and signing can be found on Zendesk.
- Signed paper document: The client signs the paper version of the ROI and the agency keeps the paper on file for at least seven years, noting the location of the paper file in Clarity.

To document consent when client is added, look at the right hand side panel, you will see the following options:



Permission: select Yes or No to document consent: If no is selected, all the other fields disappear- click "Add Record" to complete the documentation (don't forget to also mark the client as Private per section 5 of this guide).

Start Date: the client signed the ROI. The "Start Date" defaults to today's date, but it must be configured to reflect the date the ROI was signed .

End Date: date that the ROI will expire. It will default to seven years after the start date.

Documentation: select the appropriate item from the drop-down list and click Add Record.

If verbal or implied consent was given, no other documentation is required. Keep in mind that only some programs allow this type of ROI. Please contact your DPAL if you have questions about the right type of consent for your program.

Documentation for client giving written consent:

Attached PDF: You will be prompted to upload the scanned, hard copy of the ROI signed by your client

Signed Paper Document: indicates that you are storing a physical copy of the ROI onsite without uploading it to the HMIS. Enter the location of the paper document. This option is not ideal and should be used sparingly.

Electronic Signature:

RELEASE OF INFORMATION

Permission	Yes
Start Date	12/05/2018
End Date	12/05/2025
Documentation	Electronic Sign

E-SIGN DOCUMENT

Select "Electronic Signature" from the drop-down menu. Click the "E-Sign Document" button, the ROI form will display. At this point you can share your device with the client, allowing them to scroll through and read the ROI, and then the client and agency representative should both sign at the bottom. They can sign using a touch screen or using a mouse, or by using a plug in peripheral such as a Topaz.

ELECTRONIC SIGNATURE FORM

Printed Name of Client: _____

Signature of Client or Representative:

RESET

APPLY

Signature of Agency Witness:

RESET

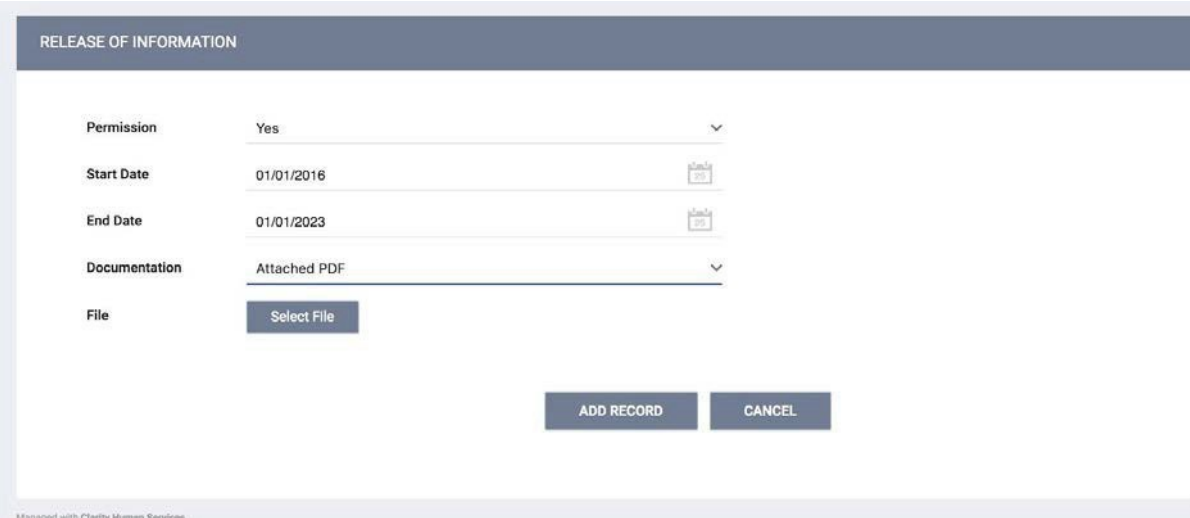
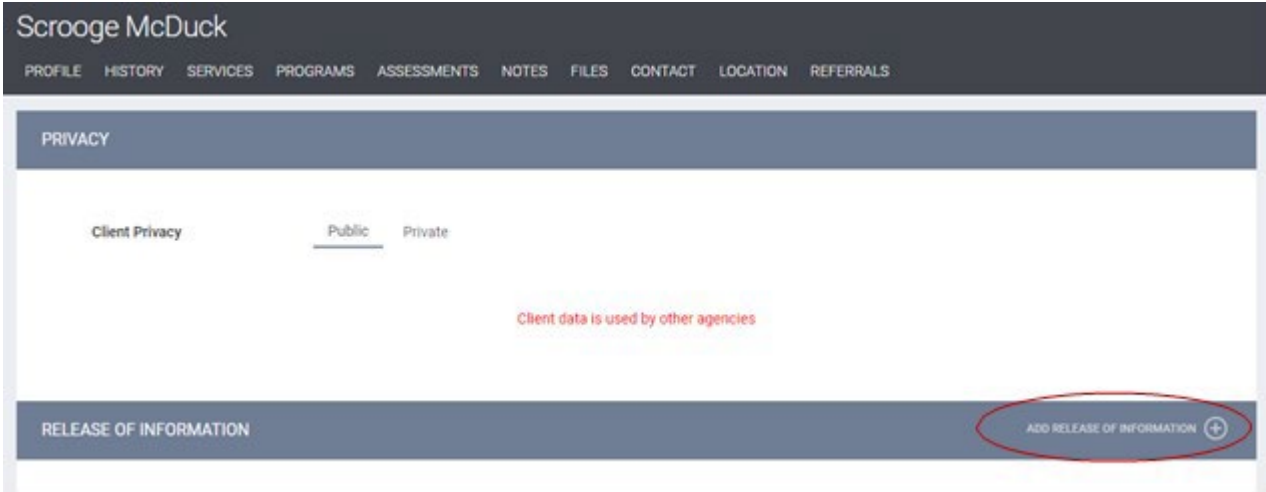
APPLY

SAVE CANCEL

You will need to click "Apply" for each signature before saving.



To document client consent on an existing client profile:
Click on the Client Privacy Shield located in upper right-hand side of the client profile screen and follow the same steps outlined for a new client.



After they've signed, and you've saved the record, the electronic signature will show up in the Release of Information section. Click the red PDF icon at the right to display a PDF of the ROI, including signature, that you can print for the client or for agency records.



*Note: Only one ROI per client per active start/end date range is permitted. The system will not allow you to upload a second ROI within the same date range. To document a new consent, the old ROI must be expired.

If you want to document an additional ROI for your agency, you may do so in the Client Files tab.

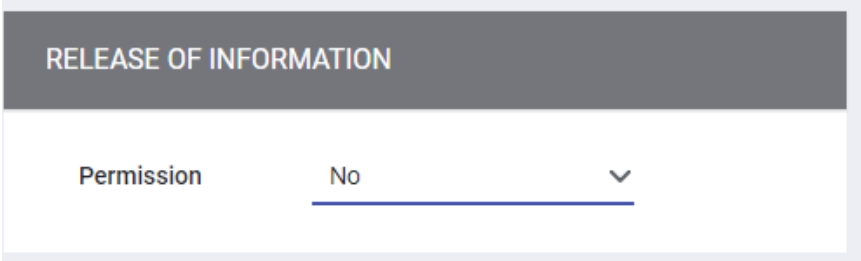
To Revoke Consent:

-A client may revoke consent by completing and signing the Client Revocation of Consent form, available at <https://cohmis.zendesk.com/hc/en-us/articles/360020127232-COHMIS-Client-Forms>

-The agency must then reach out to the Help Desk to ensure proper handling of the client record.

6. Consent Refused Data Entry

If the client states at profile creation that they do not give consent to share information, this can be reflected in the ROI. Just choose "No" on the right hand side panel at profile creation, then mark the client as private using the steps below.

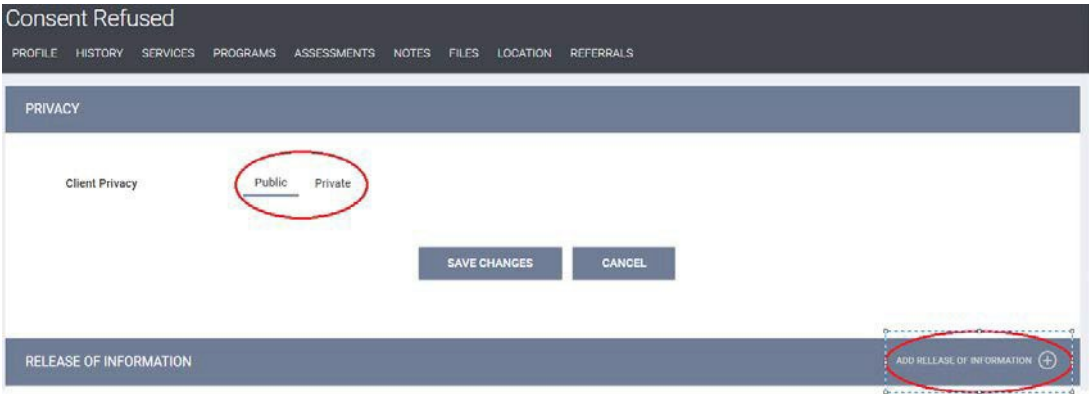


To mark a client as private:

1. Click on the Client Privacy Shield located in upper right-hand side of the client profile screen.



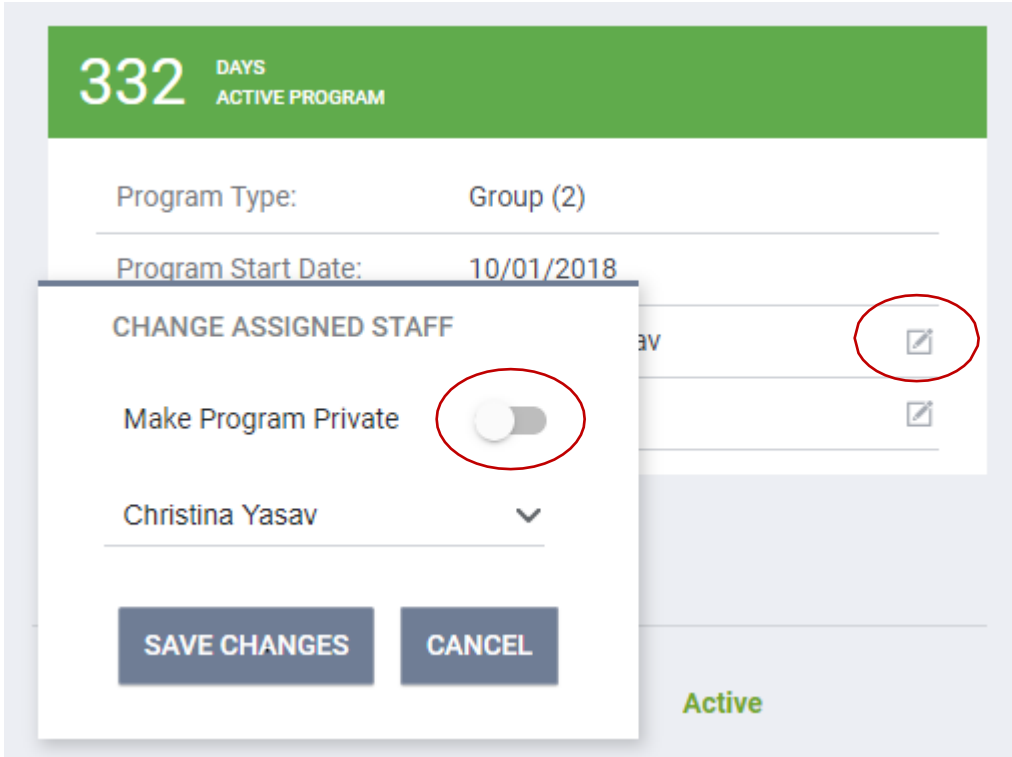
2. Toggle the Client Privacy section from Public to Private. This will allow other users at your agency to view your client, but not users from other agencies. *Note: only the agency that created the client will be able to mark the client "Private", and only if the client hasn't already enrolled in more than one agency.



3. Click Add Release of Information, if the client does not have one already. For Permission, select No to document refusal. When no is selected, all the other fields disappear- click "Add Record" to complete the documentation.

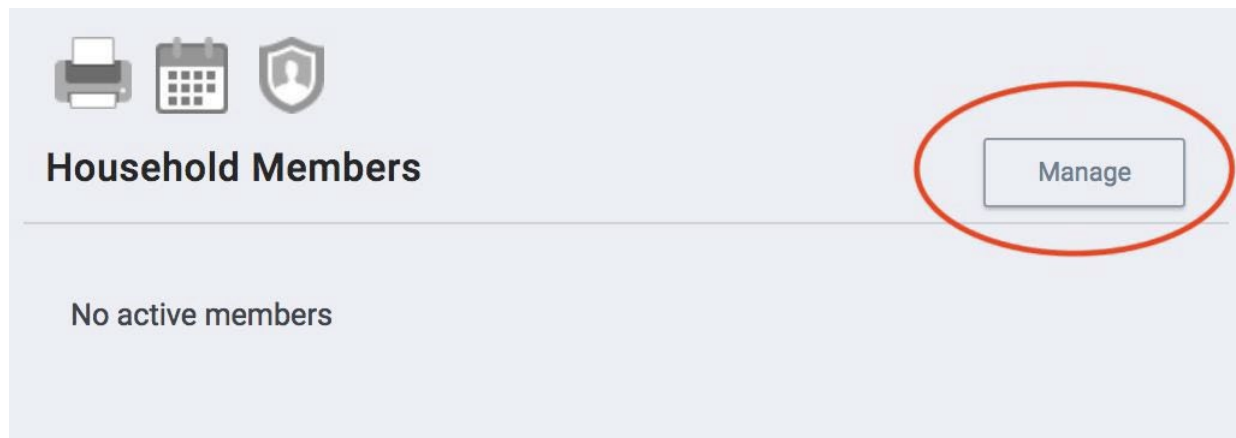
If the client already has a profile but wishes to decline consent to share your agency's involvement, you may leave the profile public but make your program enrollment private instead. To do so, enroll the client as normal, then under the Assigned staff edit button, toggle on the "make program private" switch. This is only for clients that do not want to share their involvement with your agency.

This is not sufficient for clients who have signed a revocation of consent- please contact the help desk for assistance with revoking consent.

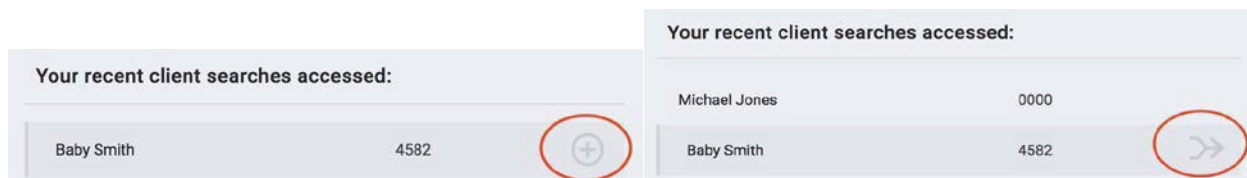


7. Creating Family/Household Groups

Begin by verifying that each family/household member exists in HMIS. If they do not, complete the above steps for "Adding A New Client" to create a file for each member. Open the profile for the head of household. In the upper right corner, under the header "Household Members", click "Manage".



If you have recently accessed the family member files, they will be listed on the right-side menu under the header "Your recent client searches accessed". If the family member is listed there, click the plus sign + to add them to the head of household's group.



Add

Join

NOTE: When a listed client has "Join" as an option, that person is already part of an existing family/household group. Rather than adding them to your client's household, you are given the option of joining your head of household client to the existing group. Pay careful attention to the result.

You also have the option of searching for members directly from the Family/Household Management screen.

HOUSEHOLD MANAGEMENT




Search for a Household Member

smith baby SEARCH


Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Client	Date of Birth	Last Four SSN	Last Updated
 Baby Smith	01/06/13	4582	03/22/16

Complete the same steps for each member until all clients are listed in the Family/Household Members section in the upper right corner of your screen.

Household Members Manage

Baby Smith	Daughter	
Michael Jones	Significant Other	

If a member leaves the household, clicking "Edit" from the Members list will allow you to enter an End Date to remove them from the group. The edit button will populate when you hover your mouse pointer of the client. Removing a person from the global household does not automatically exit them from any programs they might be participating in with the household, so don't forget to exit them from your program if appropriate.

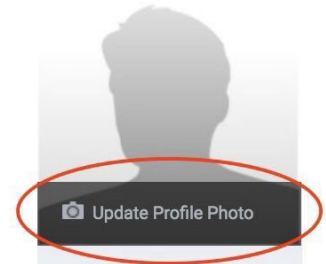
8. Adding A Client Photo

Uploading photos to your client files can provide a quick method of identification. There are two ways to attach a photo to the client profile: upload photo and take photo.

To upload a photo:

1. Save a digital photo of the client to your computer. Clarity supports JPG and PNG file types.
2. From the Client Profile screen, select
3. "Update Profile Photo" in the upper right section.
4. Click "Select File" from the Upload Photo screen.
5. Locate and select the photo from its location on your computer.
6. Click "Upload"

Your saved photo will now be visible from the Client Profile screen.




Jody Smith

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES LOCATION REFERRALS

CLIENT PROFILE

Social Security Number	XXX - XX - 6789	
Quality of SSN	Full SSN Reported	▼
Last Name	Smith	🗑️
First Name	Jody	
Quality of Name	Full name reported	▼
Quality of DOB	Full DOB Reported	▼
Date of Birth	12/25/1970	Adult Age: 47



UNIQUE IDENTIFIER
0DF7AB37D

To take a photo directly from within Clarity, you must have a camera or webcam connected.

1. From the Client Profile screen, select "Update Profile Photo"
2. If the camera is properly configured to your computer, it will activate automatically. Below the image, you have two options: take a picture instantly or take a picture after three seconds.

TAKE PHOTO FROM WEB CAMERA



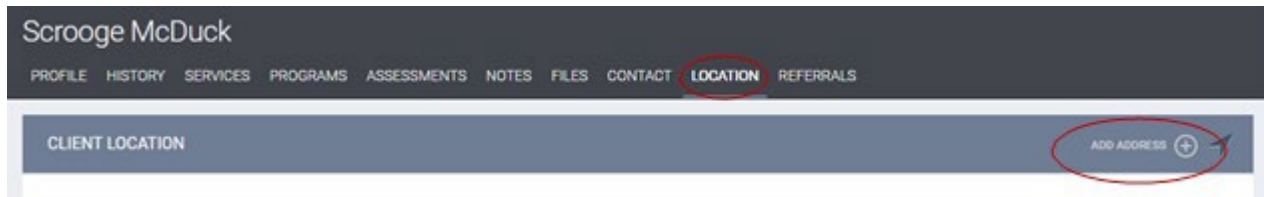
TAKE A PICTURE INSTANTLY | TAKE A PICTURE AFTER 3 SECONDS

3. Once the photo has been taken, click Save Picture to attach it to the client profile. If you are taking a photo with a smartphone, make sure to take the photo in landscape instead of portrait mode to prevent the photo from loading sideways.

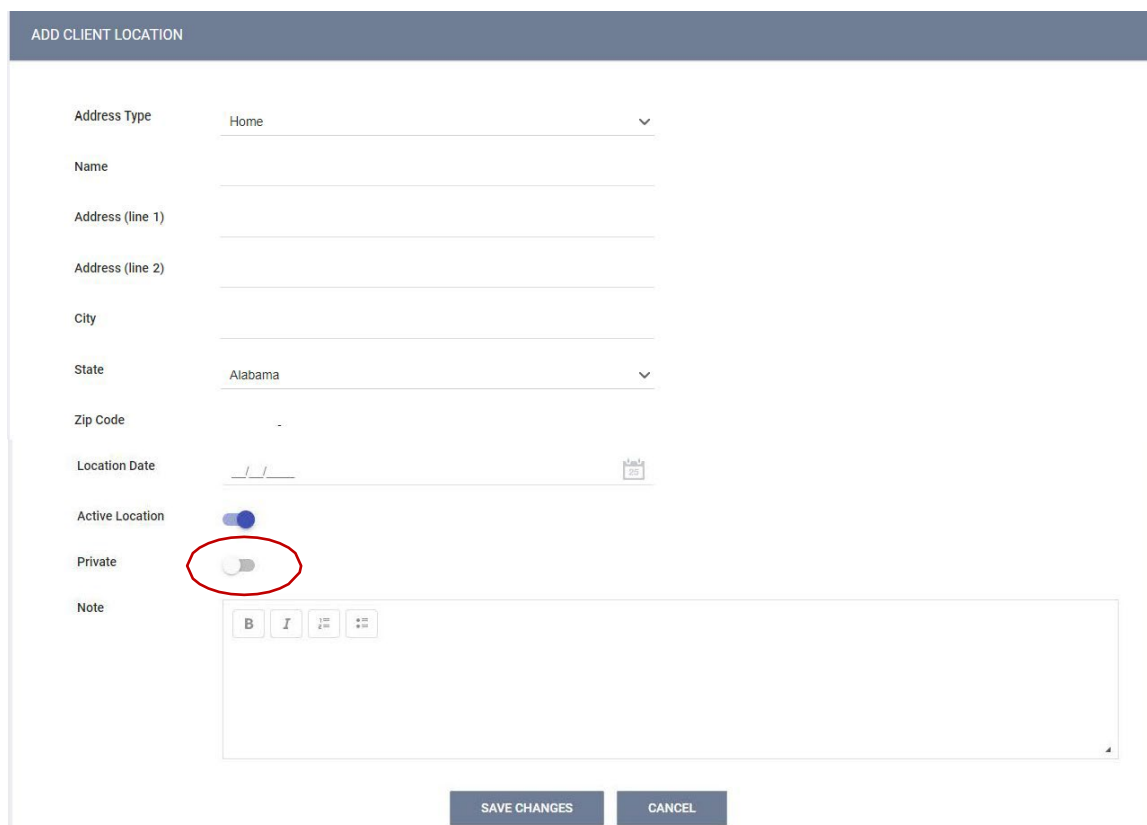
9. Adding Address & Contact Information

The default sharing setting for address, email, and phone number is to share across agencies, but it is possible to make this data private if there are concerns about sharing a client's location.

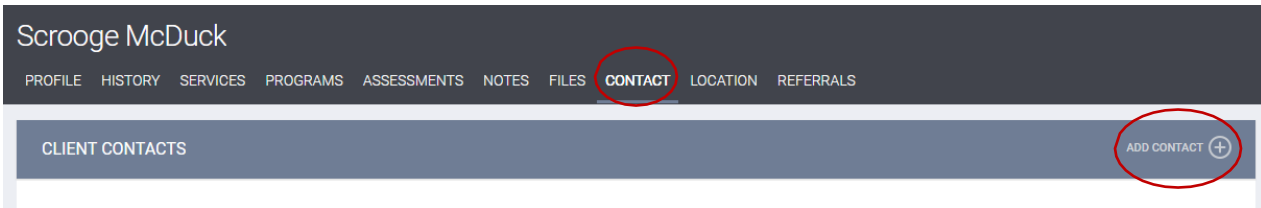
Click on the "Location" tab in the client file. Click "Add Address".



Complete Location information and Click "Save Changes". If you do not want to share this client location, toggle on the "private" switch and only members of your agency will see the listing. Required elements on this page are Name, Address, City, and Location Date.



For phone numbers and email addresses, go to the "Contact" tab, then click "add Contact"



Enter the appropriate information, including at least the contact type and date, then click "Save Changes".

The "ADD CONTACT" form contains the following fields and controls:

- Contact Type:** A dropdown menu currently set to "Client". A red arrow points to this field.
- Email:** An empty text input field.
- Phone (#1):** A text input field containing "XXX-XXX-XXXX".
- Phone (#2):** A text input field containing "XXX-XXX-XXXX". A red box groups these two fields with the instruction "Enter as much relevant contact info as you can".
- Active Contact:** A toggle switch that is currently turned on (blue).
- Private:** A toggle switch that is currently turned off (grey).
- Contact Date:** A date picker field showing a calendar icon and the date "28". A red arrow points to this field.
- Note:** A rich text editor with formatting options (B, I, list, link) and a large text area.
- Buttons:** "SAVE CHANGES" and "CANCEL" buttons at the bottom. The "SAVE CHANGES" button is circled in red.

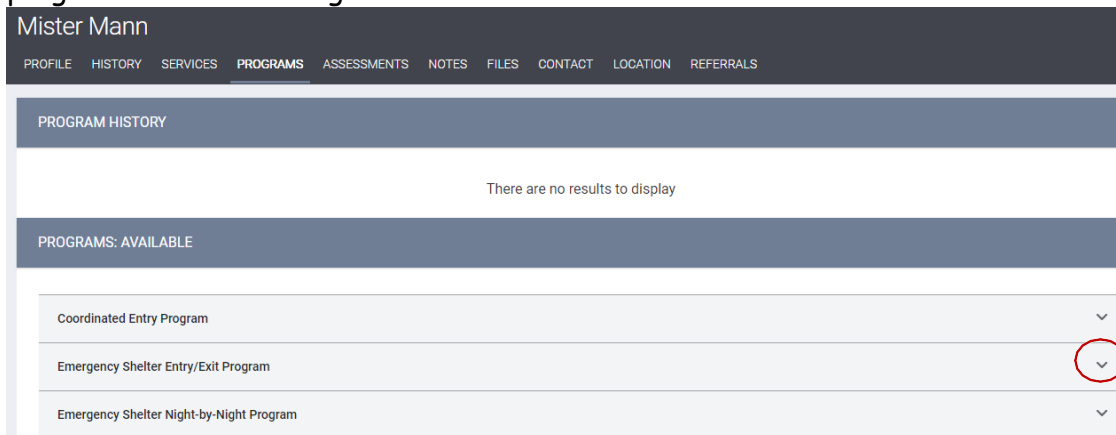
10. Enrolling Clients into Programs

The Programs tab in the client file contains two sections:

Program History provides a listing of programs your client is either currently enrolled in or has been enrolled in in the past.

Programs Available lists current programs provided by your agency that are available for client enrollment.

To enroll a client/household into a program, simply select the down arrow next to the applicable program title under Programs: Available.



The screenshot shows the client file interface for 'Mister Mann'. At the top, there is a navigation bar with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (selected), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below the navigation bar, there are two main sections: 'PROGRAM HISTORY' and 'PROGRAMS: AVAILABLE'. The 'PROGRAM HISTORY' section displays the message 'There are no results to display'. The 'PROGRAMS: AVAILABLE' section contains a list of three programs, each with a dropdown arrow to its right. The dropdown arrow for the 'Emergency Shelter Entry/Exit Program' is circled in red.

Program Name	Action
Coordinated Entry Program	▼
Emergency Shelter Entry/Exit Program	▼
Emergency Shelter Night-by-Night Program	▼

Mister Mann

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

179 CLIENTS
40 % Families
60 % Individuals

125 UNITS
357 % Checked In
0 % Reserved
-257 % Available

Funding Source
HUD/ESG - Emergency Shelter (operating and/or essential services)
Availability
Full Availability

Service Categories:
✓ Food
✓ Rental Assistance
✓ Security Deposit
✓ Utility Payments
✓ Case Management
✓ Life Skills

HOUSING AVAILABILITY:
Households with at least one adult and one child 100 Beds in 35 Units

Include group members.
 Missus Mann
 Baby Mann










PRINT DIRECTIONS DOC REQUIREMENTS **ENROLL**

Select the group members to include by toggling their switches to the right, and click "Enroll". In this example we are enrolling Mister Mann and including his family member Baby Mann. Missus Mann is not included in this enrollment. (Note: the family members will become part of the Group Enrollment when we toggle to include them before clicking the "Enroll" button.)

It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to the required APR for your program(s).

⚠ Changes have not been saved. Please correct your entry and try again.

Enroll Program for client Mister Mann

Project Start Date	<input type="text" value="__/__/__"/> 
Relationship to Head of Household	<input type="text" value="Select"/> 
Is the Client an Adult or Head of Household?	<input type="text" value="Yes (Automatically Generated Response)"/> 
Is the Program Type a Permanent Housing Program Type?	<input type="text" value="Yes (Automatically Generated Response)"/> 
LIVING SITUATION	
Type of Residence	<input type="text" value="Select"/> 
Length of Stay in Prior Living Situation	<input type="text" value="Select"/> 
DISABLING CONDITIONS AND BARRIERS	
Disabling Condition	<input type="text" value="Select"/> 
Physical Disability	<input type="text" value="Select"/> 
Developmental Disability	<input type="text" value="Select"/> 

In the example above, required program fields were left blank illustrating data elements that are required to save the client enrollment. The required fields vary from program to program and should line up with the intake form for your program.

Complete ALL fields in the enrollment page for your client and click "Save & Next". If you had toggled any family members to be included in this program, their Enrollment page will automatically come up next until each member's enrollment has been completed. Continue to click "Save & Next" after completing each group member's Enrollment. Enrolled family members will be listed in the right sidebar under "Program Group Members".

Enroll Program for client Michael Jones

Project Start Date: 03/01/2017

Zip Code of Last Address: 87654

Quality of Zip Code: Full or Partial Zip Code Reported

Relationship to Head of Household: Self (Head of household)

Is the Client an Adult or Head of Household?: Yes (Automatically Generated Response)

Is the Program Type Either Emergency Shelter, Safe Haven, or Street Outreach?: Yes (Automatically Generated Response)

LIVING SITUATION

Type of Residence Immediately Prior to Program Enrollment: Place not meant for habitation

Length of Stay in Prior Living Situation: One week or more, but less than one month

Approximate Date Homelessness Started: 03/08/2017

Number of times on the streets, in ES, or SH in the past three years: Two Times

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years: Two Months

ENROLLING PROGRAM

Program Type: Group (3)

Assigned Staff: [dropdown]

Head of Household: Michael Jones

Program Group Members

- Baby Smith
- Jody Smith

To add a member of the household to an existing program enrollment (such as a new baby), create a profile for the new member, if necessary, and assign them to a household. Then go to the HOH's profile (or any member of the household that is already in the program), go to the programs tab, click the edit button next to the program name, then click the plus sign next to program group members- see below. This will pop up a dialog box that will allow you to toggle additional household members into the program.

Candy Cane

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES LOCATION REFERRALS

Christina Yasav, Colorado Training Agency

SEARCH CASELOAD

PROGRAM: SSVF RRH PROGRAM

Enrollment History Provide Services Assessments Notes Files

Program Service History

Service Name	Start Date	End Date
SSVF Financial Services: Security deposit Colorado Training Agency	10/15/2018	10/15/2018
Case management services: Case management services Colorado Training Agency	10/15/2018	10/15/2018

Reservation Service Referral

Managed with Starkey Human Services

77 DAYS ACTIVE PROGRAM

Program Type: Group (3)

Program Start Date: 10/01/2018

Assigned Staff: Colorado Train12

Head of Household: Yellow Submarine

Program Group Members

Yellow Submarine	10/01/18	Active
Flower Child	10/01/18	12/10/18

Status Assessments

No statuses

Assessment due every three months
Notification: ON

11. Program Service Transactions

When all Enrollments are complete, the "Provide Services" page will appear for your client.

The screenshot shows a web interface for the 'STREET OUTREACH PROGRAM'. At the top, there is a dark blue header with the text 'PROGRAM: STREET OUTREACH PROGRAM'. Below this is a navigation bar with tabs: 'Enrollment', 'History', 'Provide Services' (which is selected and underlined), 'Assessments', 'Notes', 'Files', and 'Forms'. To the right of the navigation bar is an 'X Exit' button. The main content area is titled 'Services' and contains a list of service categories, each with a dropdown arrow on the right:

- Case Management
- Life Skills
- Rental Assistance
- Security Deposit Assistance
- Utility Payment
- [Street Outreach Program] Contact

Click once on the service you wish to provide to expand the drop down.

The screenshot shows the expanded form for the 'Utility fee payment assistance' service. The form includes the following fields and options:

- Start Date:** 02/15/2019 (with a calendar icon)
- End Date:** 02/15/2019 (with a calendar icon)
- Expense Amount:** 0.00
- Expense Date:** 02/15/2019 (with a calendar icon)
- Funding Source:** No Funding Source (with a dropdown arrow)
- Include group members:** Three toggle switches are shown, all currently turned off:
 - Louie McDuck
 - Dewey McDuck
 - Hewey McDuck
- Service Note:** A text area with a rich text editor toolbar containing buttons for Bold (B), Italic (I), Bulleted List, and a menu icon.

At the bottom right of the form is a dark blue 'SUBMIT' button.

Enter the Start and End Dates and any expense associated with the service. Verify that the

proper funding source is selected (if applicable) and toggle on any group members who should also receive this service.

Click "Submit" to complete the service placement. In this example we have provided only the head of household with Financial Services, but in the next example, we provided the entire family with case management.

Be careful when providing notes with services. This field is not intended for Case Notes, and users from other agencies will be able to see what you enter here on the client's History tab.

Case management services

Start Date: 02/15/2019 End Date: 02/15/2019

Include group members:

- Louie McDuck
- Dewey McDuck
- Hewey McDuck

Service Note

Other agencies can see this note

SUBMIT

Continue providing the client with any additional services that are being provided via this program by following the above steps.

When you have finished, both the program enrollment and associated services should be visible from the Program History:

PROGRAM: SSVF RRH PROGRAM

Enrollment **History** Provide Services Assessments Notes Files

X Exit

Program Service History

LINK FROM HISTORY

Service Name	Start Date	End Date	
SSVF Financial Services:Utility deposit Colorado Training Agency	03/29/2019	03/29/2019	Ⓢ
Assistance obtaining VA benefits:Educational assistance Colorado Training Agency	12/06/2018	12/06/2018	
Case management services:Case management services Colorado Training Agency	11/15/2018	11/15/2018	
Case management services:Case management services Colorado Training Agency	11/15/2018	11/15/2018	☐

Reservation Service Referral

12. Completing Status or Annual Assessments

Depending upon the funding source for your program, you may be required to complete Status and/or Annual Assessments at regular intervals for all active clients. These are generally completed every 90 days (for Status Assessments) and/or once per year (for Annual Assessments). All HMIS enrollments that are active/open require an annual assessment within 30 days of the project start anniversary date each year. In addition, you should complete a status update any time there is a known change to the client's situation, such as a move in date or a change in income. Please check your contract for other specific requirements.

From the Programs tab, open the enrollment by clicking on the Edit icon. The right-side menu contains the header Status Assessments. Click the Add icon (+) to complete a new Status or Annual Assessment.

The screenshot shows the HMIS interface for a program named 'PSH HOUSING'. The main area displays 'Program Service History' with a message 'There are no results to display'. On the right, a sidebar shows program details for '393' active program, including 'Program Type: Group (3)', 'Program Start Date: 02/06/2017', 'Assigned Staff: Stacy Holmes', and 'Head of Household: Michael Jones'. Below this is a 'Program Group Members' table with two members: 'Baby Smith' and 'Jody Smith', both with dates '02/06/17' and status 'Active'. At the bottom of the sidebar, the 'Status Assessments' section is highlighted with a red circle, showing 'Assessment Due - February 6th 2018' and 'No statuses'. A red arrow points to the '+' icon in the 'Status Assessments' header.

If this enrollment is a Group enrollment, you will be prompted to select which household members you would like to provide an assessment for. In most cases this will be all members.

The 'ADD PROGRAM ASSESSMENT' dialog box displays three household members with their roles and toggle switches:

<input checked="" type="checkbox"/>	Michael Jones	Significant Other
<input checked="" type="checkbox"/>	Baby Smith	Daughter
<input checked="" type="checkbox"/>	Jody Smith	Mother

At the bottom, there are two buttons: 'ADD STATUS ASSESSMENT' and 'ADD ANNUAL ASSESSMENT'.

Select "Add Status Assessment" or "Add Annual Assessment". Complete all data fields on the Program Status screen and be sure to enter the correct date the assessment was conducted.

Click "Save & Next" when you are finished. If this is a group case, additional members' assessment/program status screens will appear until each has been completed. Completed assessments can be viewed and/or edited from side menu on the right.

13. Exiting Clients from Programs

All clients must be properly exited upon completion of the program or cessation of services. Please make sure all services are entered prior to documenting the exit, as you will not be able to document services on an exited enrollment. From the Programs tab in the client file, find the program you wish to exit the client or household from and open the enrollment by clicking on the Edit icon.

Green Bowl

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
PTA_Family Shelter entry/exit_ES Emergency Shelter: Entry/Exit Date PPCoC Training Agency ⓘ	11/10/2021	Active	Individual

From the Program, click on "Exit"

Green Bowl

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: PTA_FAMILY SHELTER ENTRY/EXIT_ES

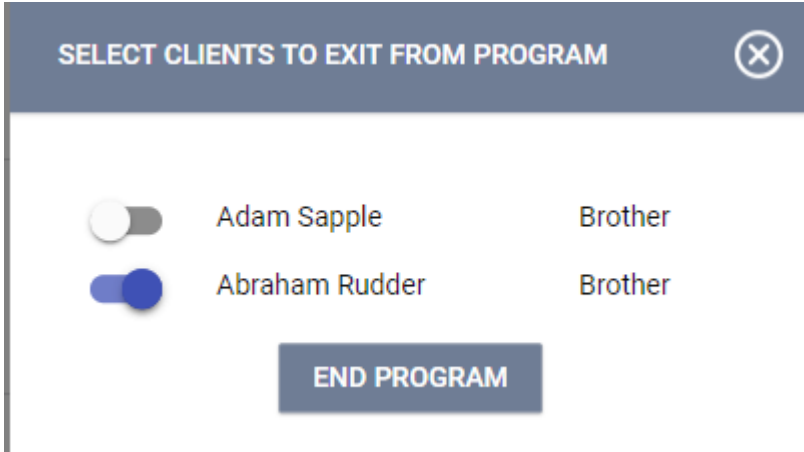
Enrollment **History** Provide Services Assessments Notes Files **x Exit**

Program Service History

Service Name	Start Date	End Date
Meal:Dinner PPCoC Training Agency ⓘ	03/29/2022	03/29/2022

Reservation Service Referral

If this enrollment is a *Group* enrollment, you will be asked which members of the household you will be exiting. A pop-up window will allow you to toggle members to exit multiple household members at the same time (in most cases you should toggle each member and exit all group members at once.)



Toggle	Name	Relationship
<input type="checkbox"/>	Adam Sapple	Brother
<input checked="" type="checkbox"/>	Abraham Rudder	Brother

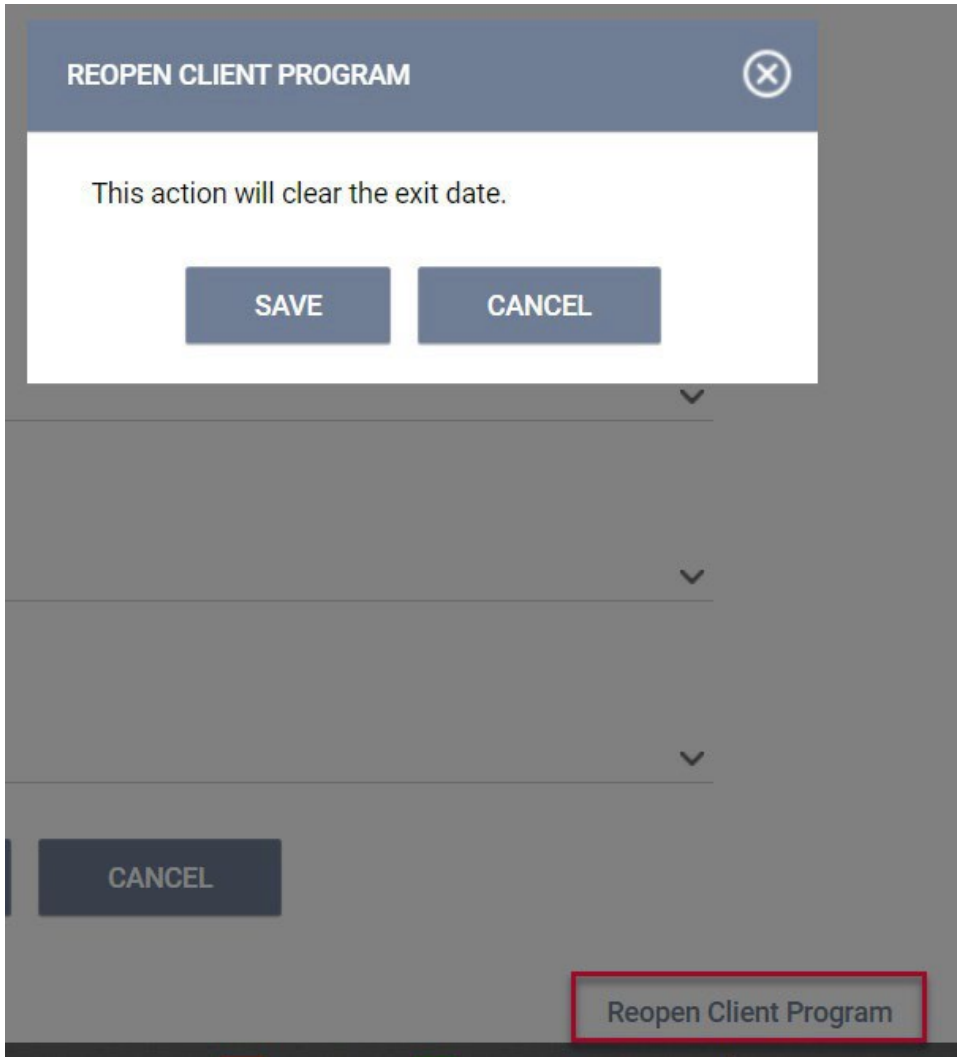
END PROGRAM

Choose the appropriate members (blue means exiting, white means remaining in program) then click "End Program"

If you toggled any group members to also be exited from this program, their End Program page will automatically come up next until each member has been completed. Continue to click "Save & Next" after completing exit information for each group members.

Fill out the appropriate exit assessment questionnaire, then click "Save & Close". Note that some of the answers in the questionnaire will be preselected for you, based on answers given during other assessments. Please make sure to review all the information before saving as some of the answers may have changed.

If an error was made while exiting a client such as missing services or the client did not yet leave the program, you can click on the "reopen client program" button at the bottom right of the exit screen. Once the program is open again, you can document any missing services and then re-enter the exit information when appropriate.



14. Program Screen Overview

When editing a program, you will see the following screen:

The screenshot displays the user interface for editing a program for Fred Flintstone. The top navigation bar includes the user's name, Christina Yasav, and the agency, PPCoC Training Agency. The main content area is divided into two sections. On the left, the 'PROGRAM: PTA_FAMILY SHELTER ENTRY/EXIT_ES' header is followed by a tabbed interface with 'History' selected. Below the tabs, the 'Program Service History' section shows 'No results found' with a legend for Reservation, Service, and Referral. On the right, a green box indicates '1074 DAYS ACTIVE PROGRAM'. Below this, program details are listed: Program Type (Group (3)), Program Start Date (09/01/2019), Assigned Staff (Colorado Train1), and Head of Household (Fred Flintstone). The 'Program Group Members' section lists Wilma Flintstone (09/01/2019 to 04/20/2022) and Pebbles Flintstone (09/01/2019, Active). The 'Status Assessments' section shows an assessment due on September 1st 2020, with a 'STATUS' button for the date 10/16/2019.

On the left, you may see some or all of the following tabs:

- Enrollment - Opens the enrollment screen that was completed at entry
- History - History of client's services associated with the program with the option to edit
- Provide Services - Allows placement of services associated with the program
- Assessments - Option to view/edit or add status and/or annual assessments
- Notes- Allows private notes shared only with your agency to be documented on the program
- Files- Allows document uploads that you can choose to be shared or private
- Exit - Opens the exit screen to document results at termination of the client's program stay

On the right sidebar, you will see an overview of the entire group enrollment:

The screenshot displays a group enrollment overview with the following sections and callouts:


- Current program status and length of stay:** Points to the green header bar showing "1074 DAYS ACTIVE PROGRAM".
- Start and end date for HoH:** Points to the "Program Start Date: 09/01/2019" field.
- View/edit Caseworker name(s):** Points to the "Assigned Staff: Colorado Train1" field with a checkmark icon.
- View/edit household structure:** Points to the "Head of Household: Fred Flintstone" field with a checkmark icon.
- List of group members with program entry and exit dates:** Points to the "Program Group Members" table.
- Edit group member's enrollment (note: edit button will populate with mouse pointer):** Points to the "04/20/2022" date for Wilma Flintstone.
- Add Status or Annual Assessment:** Points to the "Status Assessments" section.
- Assessment history:** Points to the "10/16/2019 STATUS" entry in the assessment history.

Program Group Members		
Wilma Flintstone	09/01/2019	04/20/2022
Pebbles Flintstone	09/01/2019	Active

Status Assessments	
10/16/2019	STATUS

15. History Screen Overview

The History screen provides a complete look at Services and Programs that the client has participated in, while also allowing the ability to edit items provided by your agency.

HISTORY			
Advanced Search Options View ▾			
Service Name	Start Date	End Date	
CE Training Program Colorado Coordinated Entry Training Agency	11/16/2018		Active
Coordinated Entry Program Colorado Training Agency	11/15/2018		Active
Permanent Housing Program Colorado Training Agency	11/15/2018		Active
Emergency Shelter Night-by-Night Program Colorado Training Agency	11/15/2018		Active
[Emergency Shelter Night-by-Night Program] Bed Night:Bed Night Colorado Training Agency	11/15/2018	11/30/2018	

Program
 Service
 Referral
 Reservation
 Assessment

A legend for the color coding is provided at the bottom of the section. For example, programs the client has been or is currently enrolled in will appear with a light yellow/beige background to separate them from regular service transactions.

Homeless Prevention and Rapid ReHousing Clarity Test Agency	04/10/2012	Active
--	------------	---------------

Service transactions with attached expenses are marked with a "\$" icon at the right of the listing. Hover your mouse over the icon, and additional financial details are displayed. This includes the total expense amount, and the funding source the expense was applied to.

If your client has a very large history spanning multiple pages of results, the "Show advanced search options" feature provides an excellent interface to narrow down your results. The advanced search options allow the following criteria:

HISTORY

Advanced Search Options Hide ^

Search

Category Agency Start Date End Date

Type

Clear

SEARCH

Search - Filter for a keyword within the title

Category - Filter for a specific category of service using the convenient drop-down

Agency - Filter for a specific Agency that provided the service

Date Range - Filter based on a specific date range of service provision

Type- if only want to look at one type of history item, like referrals

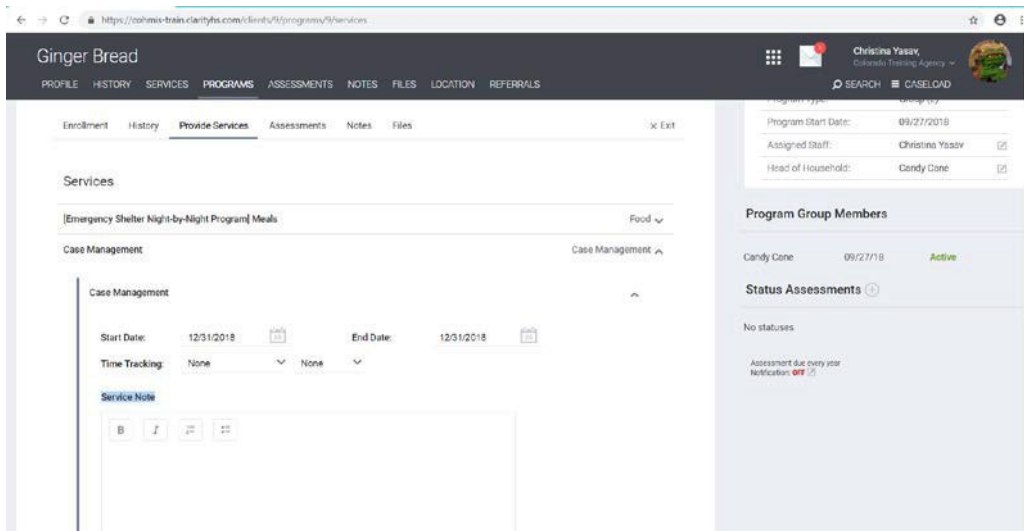
By clicking the Edit icon to the left of a service name you will be able to add service notes, adjust dates, add additional expenses, and more.

Clicking the Edit icon on a Program will place you directly into the program screen overview.

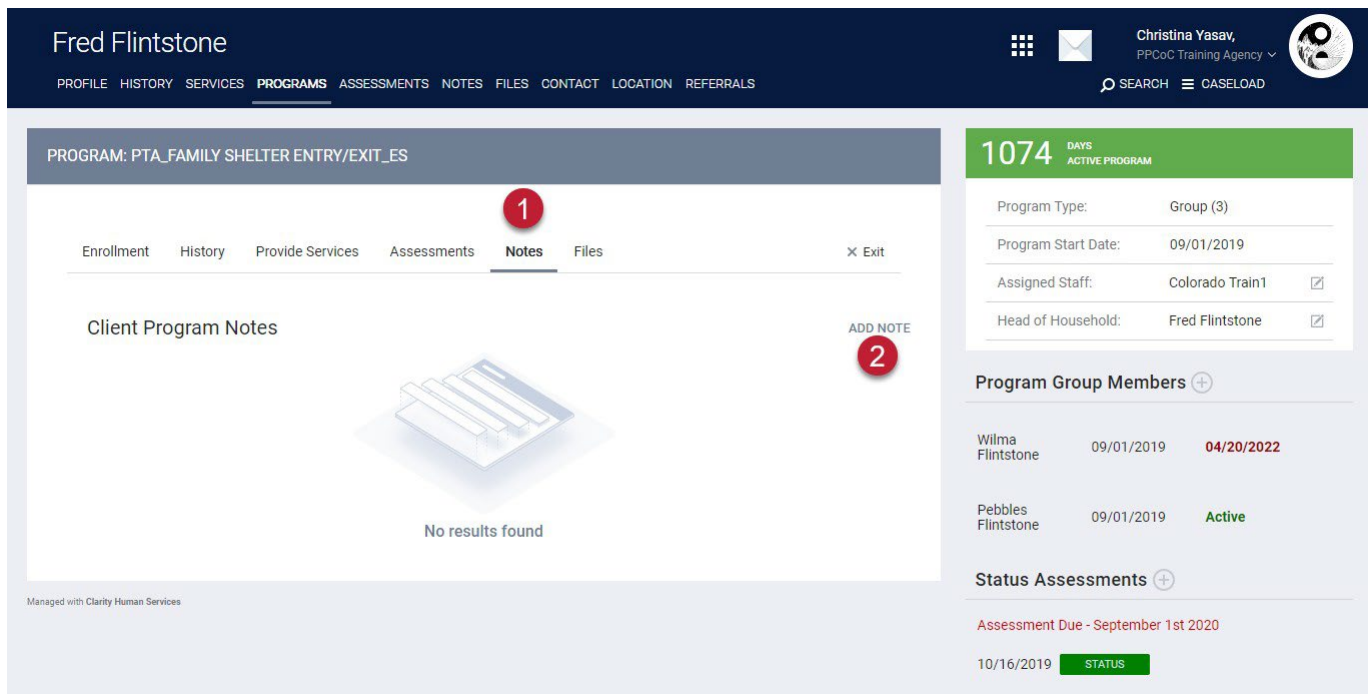
16. Service Notes vs. Case Notes

Service notes attached to program services can be viewed by other agencies. Case notes are not visible to other agencies.

To add a service note, simply fill out the appropriate information in the notes box while providing a service.



To add a case note, make sure you are in the program the note applies to, then click the Notes tab. Click Add Note.






Enter the Title, Date and Body of your note and click "Add Record" to save.





CLIENT NOTES

Title Paperwork Appointment

Agency Sarah Agency

Date 02/10/2017  **Time Tracking:** 1 hour  **Select** 

Note

 **Bold**  *Italic*  **Numbers**  **Bullets**

Met with client to complete all pre-housing paperwork. Recently had ID stolen so working with her to go through the steps for new ID. Will refer to Project Home caseworker for next steps.

ADD RECORD **CANCEL**

17. Uploading Files

NOTE: This section will assume you have previously scanned and saved documents into separate files that are accessible through your computer.

Click on the Files tab in the client's record to open the Client Files page. Then click "Add File" in the upper right corner.

Select a category and name from the drop down menus that closest resemble the type of file you are uploading.

UPLOAD A FILE

Category: Family, Social and Legal

Name: Alimony Agreement

File: Select File

Custody Agreement.png (160.54KB)

Trouble attaching files? Switch to the Basic Uploader

ADD RECORD CANCEL

Private - When checked, the file becomes Private and only your agency will have the ability to view the file. When unchecked, regular Sharing rules for your agency apply.

Click "Add Record" to complete the upload and save.

Once a file is uploaded, it is saved to the File tab by order of the upload date. There is no limit to the number of files that can be uploaded for each client.

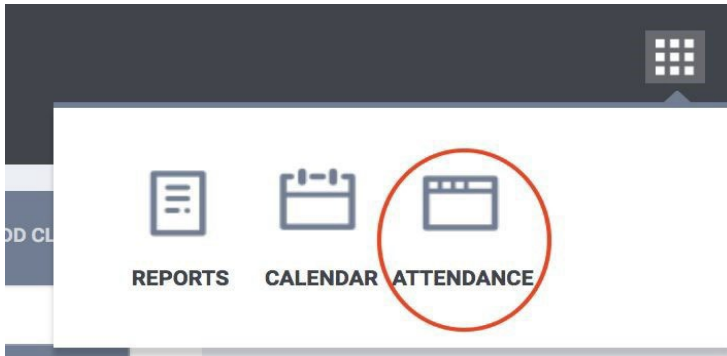
If the file you uploaded has personal protected information on it, don't forget to either store the file securely or simply delete it from the computer.

You can view the existing file simply by clicking View. You can also edit the document by uploading a new version.

Clarity supports common file types. (Word, Excel, PDF, JPG, PNG, etc.)

18. Daily Attendance Service Transactions

Daily Attendance is used for services provided on a day-by-day basis, allowing a large number of clients to be checked in for service quickly.



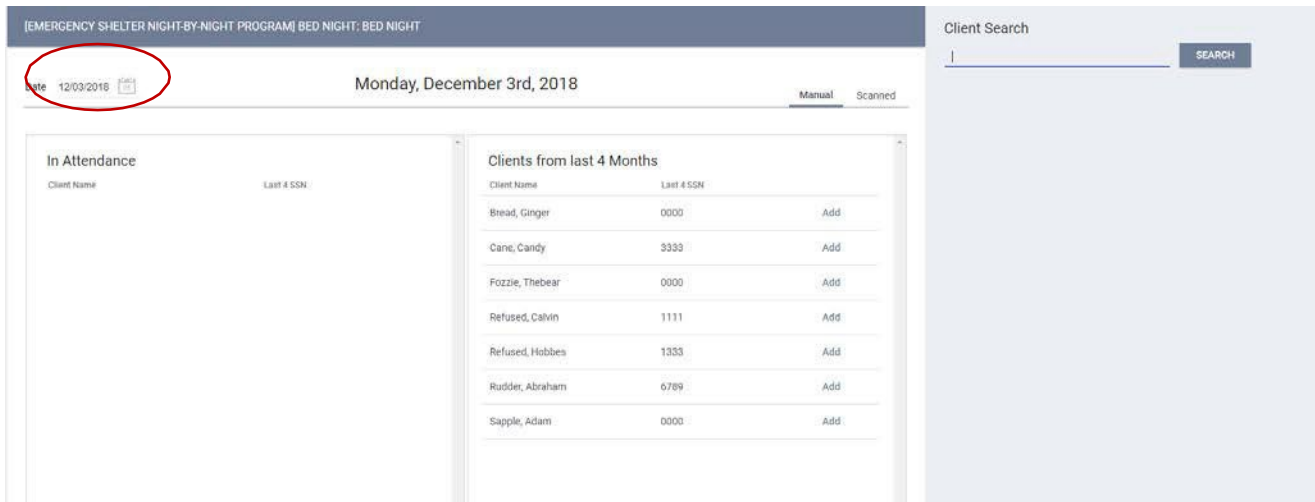
Services that require daily entry, such as night-by-night Emergency Shelters, are entered in Clarity HMIS using the Attendance button located in your launcher.

NOTE: You will only have an Attendance button in your launcher if your agency provides services that have been set up for this type of service.

After clicking on the Attendance button, a list of services available for attendance based documentation is provided. Find the program you want to document services for, and mouse over the name to populate the edit button.

ATTENDANCE	
Service Name	Category
[Emergency Shelter Night-by-Night Program] Meals: Breakfast	Food
[Emergency Shelter Night-by-Night Program] Meals: Dinner	Food
[Emergency Shelter Night-by-Night Program] Meals: Lunch	Food
[Emergency Shelter Entry/Exit Program] Meals: Breakfast	Food
[Emergency Shelter Entry/Exit Program] Meals: Dinner	Food
[Emergency Shelter Entry/Exit Program] Meals: Lunch	Food
[Emergency Shelter Night by Night Program] Contact: Not Staying on Streets, ES, or SH	Outreach Contact
[Emergency Shelter Night by Night Program] Contact: Staying on Streets, ES or SH	Outreach Contact
[Emergency Shelter Night by Night Program] Contact: Worker unable to determine	Outreach Contact
<input checked="" type="checkbox"/> [Emergency Shelter Night-by-Night Program] Bed Night: Bed Night	Housing
[PATH Services Only Program] Contact: Not Staying on Streets, ES, or SH	Outreach Contact
[PATH Services Only Program] Contact: Staying on Streets, ES, or SH	Outreach Contact

Select the appropriate date using the calendar icon at the top left of the screen.



There are two columns on the Attendance screen:

- In Attendance (left column) - all clients currently in attendance for the date selected
- Clients from last 4 months (right column) - all clients who have been in attendance at least once during the last 4 months. Note: the timeframe may be different for your program- for example, several programs have selected to show 4 weeks instead.

Using the roster of Clients from the last 4 months, click "Add" to place any returning clients into attendance for the selected date. As you "add" clients, they will be moved from the 4-month roster to the "In Attendance" roster on the left.

You can also search and add from the right-side navigation menu. This project is set up to require an enrollment before adding the daily attendance service (Joey is showing as Not Enrolled and cannot be added to the attendance list).



Clients can easily be removed from attendance by clicking on the trash can icon in the Attendance roster. This will remove the client from attendance and return them to the 4-month roster on the right.

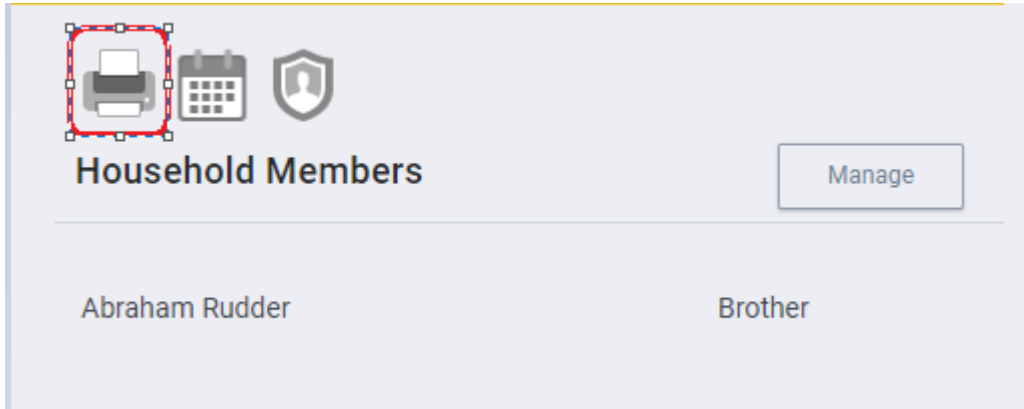
Clicking "Add" directly from the search results for your client and any applicable group members will place them with the service and add them to the "In Attendance" roster.


NOTE: Clients who are not found in your search results do not exist in HMIS. Please follow the steps for "Adding A Client" to create a file for your client prior to attempting to place them into attendance for services.

If your agency is using a scanner to enter clients into service via scan cards, click into the Search field, then scan the card. Your client will automatically be dropped into the "In Attendance" roster. You do not need to be on the "Scanned" tab for the scanners to work.

19. Printing Scan Cards

Locate your client, then click the printer icon on the top right portion of the screen.



CLIENT REPORTS	
[CLNT-103] Photo ID Card - Sample	 RUN SCHEDULE
[CLNT-104] Profile Screen	▶ RUN 📅 SCHEDULE
[CLNT-102] Client History	▶ RUN 📅 SCHEDULE
[CLNT-101] Case Notes	▶ RUN 📅 SCHEDULE
[CLNT-105] Client Appointments	▶ RUN 📅 SCHEDULE
[CLNT-125] Client Summary	▶ RUN 📅 SCHEDULE
[CLNT-106] Client Service Notes	▶ RUN 📅 SCHEDULE
[CLNT-127] Homeless Status Timeline	▶ RUN 📅 SCHEDULE

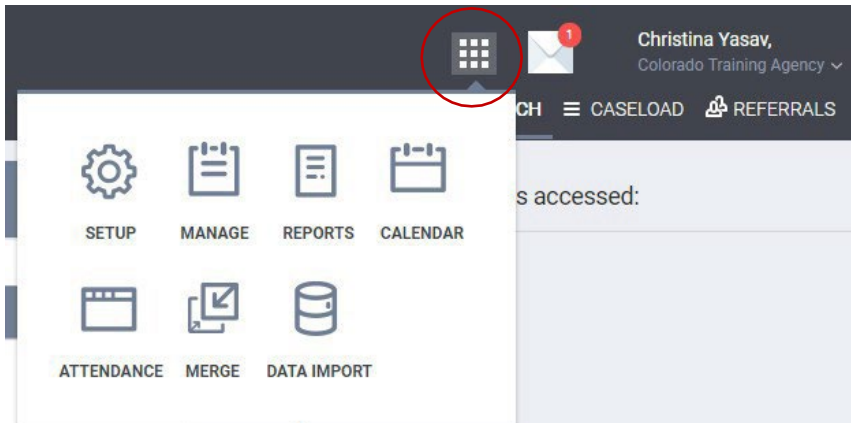
Make sure the printer settings are correct before printing: if you are using a standard printer, you will want to make sure the scan card does not print as a full page document.

There is also a batch scan card report under the "Reports" application in the launchpad. That report is useful for printing lots of scan cards on the same page, rather than one client at a time. Please review the Reports QRG on Zendesk for more information, or put in a ticket.

20. Reporting

Accessing the Report Library:

To begin using the Report Library, find the Reports Button in your launch pad.

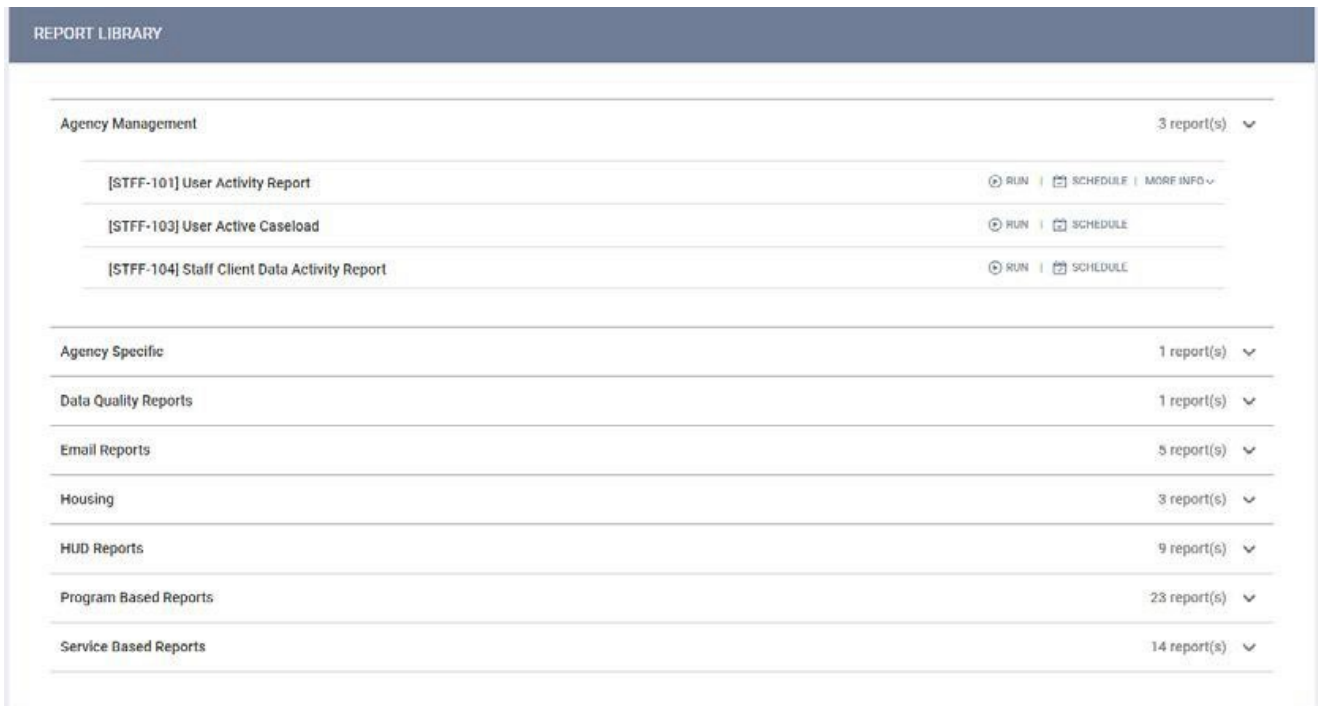


This will bring you to the Report main screen, which is divided into several sections according to report type, with Show/Hide features for easy organization.

The report section will expand to make the reports within that section available. Select the 'up' arrow to minimize the screen to its normal size.

For more information on a particular report, select the "More Info" link. The screen will expand to include a summary of the purpose of the report.

To run a report immediately click "Run."



This will take you to the Preview page. Here you can select the parameters for each report. Because each report is different, some of the parameter options will vary depending on the report.

REPORT LIBRARY EXPLORE DATA ANALYSIS **PREVIEW**

REPORT LIBRARY

HUD Reports > [HUDX-227] Annual Performance Report [Oct 2018]

CoC Filter Category Choose... ▾

CoC Choose... ▾

Program Type(s)
Choose...
All
Emergency Shelter
Transitional Housing
PH - Permanent Supportive Housing (disability required)

Program Status Choose... ▾

Program(s) Choose...

Report Date Range / / 25 - / / 25

Report Output Format Web Page PDF Excel CSV-Details CSV-Upload

Drilldown Output Format Web Page CSV

SUBMIT

Every report will ask you to select a report format. You can select Web Page, PDF, or Excel for most reports. HUD reports will also have a CSV option.

Web Page: A Web Page is a functional format that allows you to drill down on data elements to inspect the underlying data supporting it.

PDF: The PDF is a good option for official reports, grants, etc.

Excel file: If you download the excel file you can use excel to manipulate and organize the data (e.g. Sort/Check for duplicates, etc.)

CSV: file format required for upload into HUD repository

After choosing your parameters, select the 'SUBMIT' button to run the report.

A popup box will appear indicating that your report is being processed. Once the report is processed, a second popup box will appear below the first indicating the report is ready. Select 'Open' to view the report.

