

HOMELESS MANAGEMENT INFORMATION SYSTEM

Contra Costa County

January 15, 2019

CLARITY HMIS Workflow

End User Training

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<https://contracosta.clarityhs.com> (Live Site)
<https://contracosta-train.clarityhs.com/login> (Training Site)
<https://get.clarityhs.help> (Clarity wiki guide)

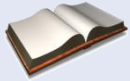
Contra Costa Standard Workflow Table of Contents

CLARITY USER HOME SCREEN	3
Logging in...	3
Navigating in Clarity	4
Logging out	5
 NEW CLIENT	 6
Client Search	6
Creating a New Client Profile	10
Adding household members	13
Release of information	19
Client Location / Addresses	22
 NEW ENROLLMENT	 26
How to enroll a client into a Program.....	26
a. Household Enrollment Option	30
b. Referral Check box	31
c. Print Directions	31
d. Print Checklist	32
 EXISTING ENROLLMENT	 33
Program based services	33
How to link a service to a program	37
Non-program based services	38
 HOW DO I CREATE CASE NOTES FOR MY CLIENTS.....	 40
Program based notes	40
Non-Program based Notes and Public Alerts.....	40
 HOW DO I ADD A STATUS UPDATE OR CONDUCT AN ASSESSMENT.....	 44
How do I add a program-based status update? (Annual reviews & General updates).....	44
How do I add a non-program based assessment (VISPDAT etc.).....	45
 PROGRAM EXITS	 46
 CLARITY GLOSSARY	 49

Clarity User Home Screen

Logging In

To perform tasks in Clarity, you need to log into the system. Every user at your organization will have a unique login and password.



Your user ID:
Your password:

1. Enter your **User ID**.
2. Press **TAB**.
3. Enter your **Password**.
4. Click **Sign in** or click the **Enter** button



- First time log in instructions

PASSWORD CHANGE REQUIRED

The password for your account has expired. Please change your password.
Your password should be 6 characters or longer, and be a combination of all four of the following

Email

Password

Your password should be 6 characters or longer, and be a combination of all four of the following

* English uppercase characters (A through Z)

* English lowercase characters (a through z)

* Numerals (0 through 9)

* Non-alphabetic characters (such as !,\$,#,%)

Password can't contain username, can't be a take on the word "clarity", can't be the same one as before.

Confirm Password

Save Changes

1. Enter **New Password**
2. Confirm Password: Enter **Same Password** again
3. Click **Save Changes**

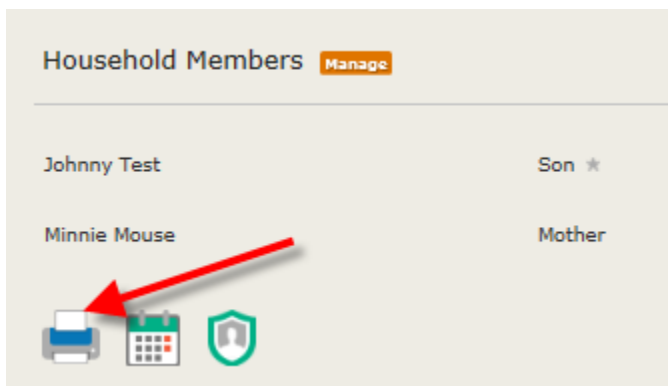
Navigating

After logging in, you will come to your home page.

Understanding the Icons

Convenient Right Sidebar - The right sidebar provides quick access to things that are relevant to the screen you are in. For example, in the Client Profile screen, the right sidebar will have information about Household Members, as well as listing the most recent Active Services, Active Programs, and Recent Services. To the right of each entry are 'View/Edit' links which will take you directly to the appropriate section of the client record.

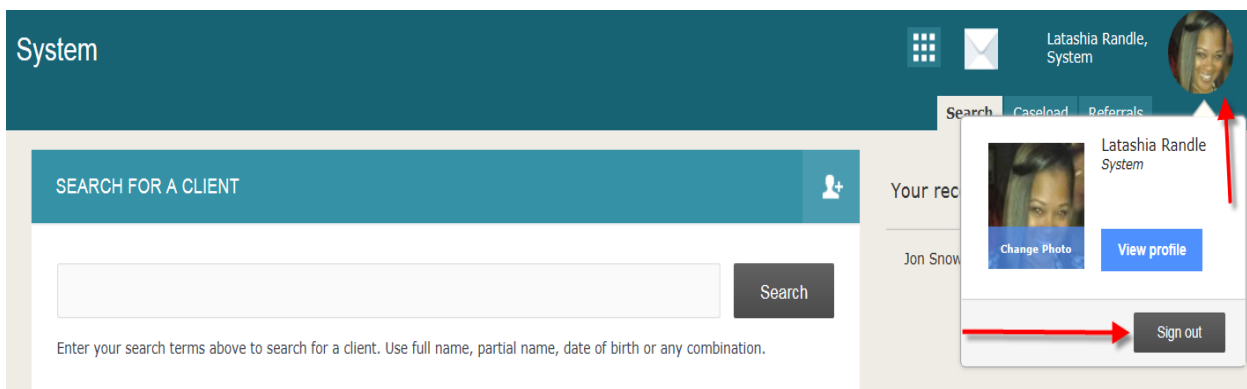
Client Reports Icon - On the right side of the screen where end-users can print the following information: Client History, Photo ID Card, Profile Screen, Case Notes, Client Appointments, and Client Summary & Client Service Notes.



Logging Out

How do I sign out of the system?

1. Click on your **Photo** or **Circle** in the upper right hand corner
2. Select the **Sign Out** button.

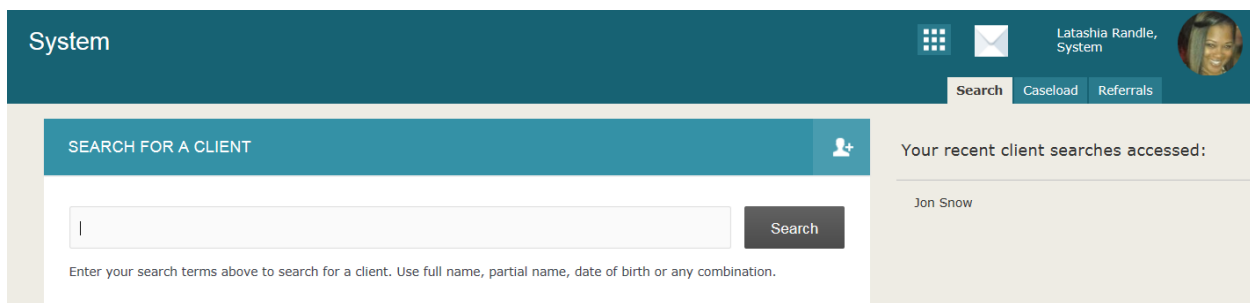


New Client

Client Search

This section discusses how to search for clients in your client database.

Upon initial login to Clarity Human Services, you are placed directly into the Search tab. This is the central hub of the system, and provides access to your clients.



The screenshot shows the Clarity Human Services interface. At the top, there is a dark teal header with the word "System" on the left, a grid icon, an envelope icon, and the user's name "Latashia Randle, System" next to a profile picture. Below the header, there are three tabs: "Search" (active), "Caseload", and "Referrals". The main content area has a teal bar with the text "SEARCH FOR A CLIENT" and a person icon with a plus sign. Below this is a search input field with a cursor, a "Search" button, and a small instruction: "Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination." To the right of the search field, there is a section titled "Your recent client searches accessed:" with a list containing "Jon Snow".

1. Enter Client Name in **SEARCH FOR A CLIENT**
2. Press **ENTER**
3. Click **EDIT**

NOTE: Before creating a new client, you must search to ensure that the client does not already exist in the database.

Clarity provides an auto-suggest mechanism, so it is an excellent idea to enter only partial first and last names when searching for a client. As you begin typing your search criteria, the system will automatically search the database and display potential clients that match your progressive criteria. This tool makes it much easier to find clients with a name that is difficult to spell.

For example: If you are searching for Betty Robinson, entering a "**Bett**" in the search field makes it much easier to find the correct client.

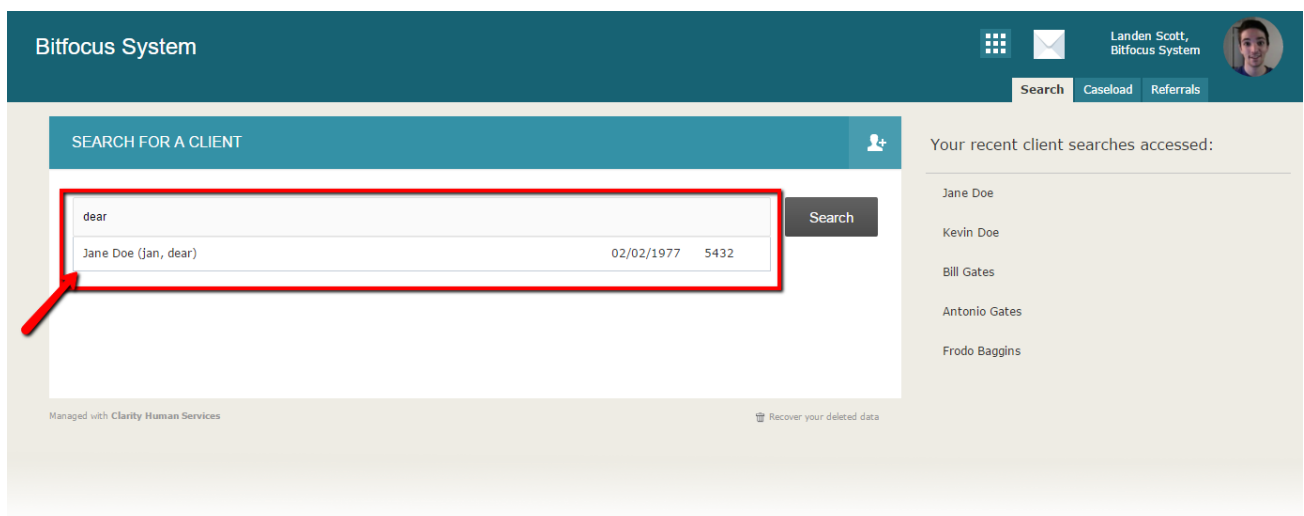


Search by Name

First Name, Last Name, or partial sections of the client's name can be entered to help locate the client record.

Aliases, Maiden Names, and Nicknames

Many clients have aliases, or past names. (i.e., maiden names, nicknames, etc.), which can complicate client search. The search feature allows you to enter a list of names a client goes by when searching for that client.

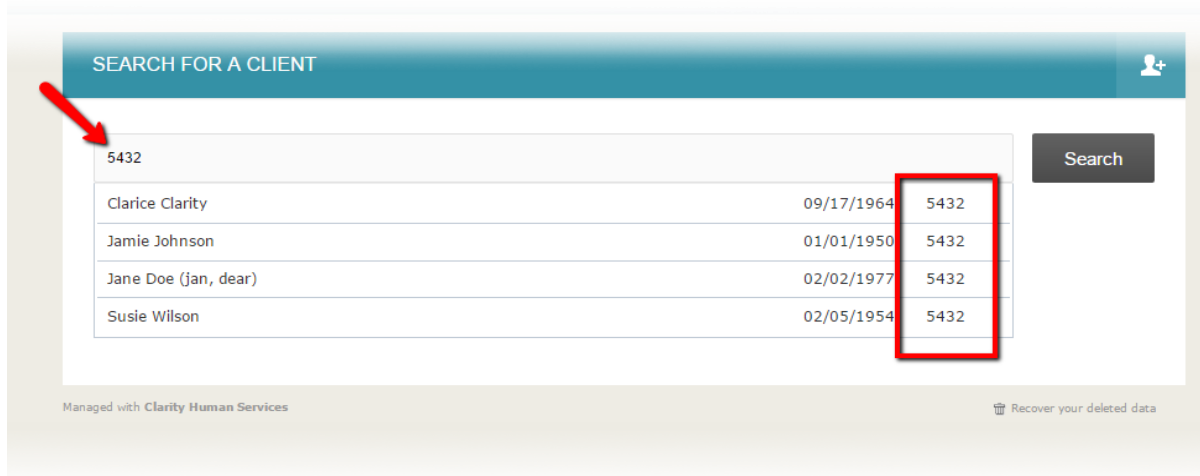


This feature is available from:

- Main search screen
- Household Members Manage screen

Search by Social Security Number

A full social security number can be entered, or portions of each section can be entered. For example: the last four digits of a client's SSN can be entered.



Search by Date of Birth

A full date of birth can be used, with the following formats: 05/15/1995, 5/15/95, or 1995-05-15.

Search by Unique Identifier

Every client created in Clarity is issued a Unique Identifier, which are 9 characters in length. Searching based on the Unique Identifier will take you directly to the Client's profile screen, bypassing the need to search through the auto-suggest list.

Client Profile Form:

- Last Name: Doe
- First Name: Jane
- Quality of Name: Full name reported
- Date of Birth: 02/02/1977 Adult. Age: 38
- Quality of DOB: Full DOB Reported
- Unique Identifier: 8922DD55B
- Middle Name: None
- Gender: Select
- Race: White

Recent Services:

- Substance Abuse Treatment:Treatment
- Mental Health Service:Mental Health
- Baltimore Emergency Shelter:[ES]...
- Emergency Shelter:Individual Beds
- Phone-Internet Access:Computer Use

Refining Your Search

As the client database grows, you may find that the results listed can be large for a common name (e.g John).

SEARCH FOR A CLIENT

John		
Alfred Johnson	06/15/1980	0231
Alice Johnson	02/09/2010	4233
Amy Johnson	07/07/1966	5989
Baby Johnson	11/11/2012	4141
Carla Johnson	08/02/1974	2233
Child Johnson	05/01/2008	8974
Cindy Johnson	01/11/2009	0000
Darla Johnson	06/11/1985	7625
Darryl Johnson	09/13/1970	7784
Don Johnson	02/21/1965	4987
10 more. Please keep typing to narrow your search.		

When a large result set is listed, you can further refine your search by combining your search terms until the result is shorter, or you find your given client. For example, a search term of “John W 7403” will search for a combination of a partial First Name, Last Name, and the last four digits of the Social Security Number.

SEARCH FOR A CLIENT

John d 8089		
John Doe	09/29/1989	8089

Managed with Clarity Human Services

Creating a New Client Profile

After a thorough search, you have determined that your client does not exist in the system. Click “Create a New Client” in the upper right corner of the Search screen.

System

Latashia Randle, System

Search Caseload Referrals

SEARCH FOR A CLIENT

mi

Search

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

	Date of Birth	Last Four SSN	Last Updated
Minnie Mouse	01/01/01	1111	05/02/17

Your recent client searches accessed:

Jon Snow

You will be taken to the Client Profile creation page. This page will present the questions necessary to create a basic client account. Complete all necessary fields to create your client.

1. Click on The **New Client Icon**
2. Complete **CREATE A NEW CLIENT Form**
3. Click **ADD RECORD**

Core Data Fields

The first fields of the Client Profile creation page are termed ‘core data fields’.

CLIENT PROFILE

Contra Costa Profile Screen

Social Security Number XXX - XX - 1111

Quality of SSN Approximate or partial SSN reported

Last Name Mouse

First Name Minnie

Quality of Name Full name reported

Quality of DOB Full DOB Reported

Date of Birth 01/01/2001 Child, Age: 16

Unique Identifier F6BF98B41

Middle Name None

Maiden Name Alias

Gender Female

Race White

Ethnicity Non-Hispanic/Non-Latino

Update photo

Be sure to complete all core fields. In the example below, the core field 'First Name' was left blank illustrating that this data element is required in order to save the client record. See 'Required vs. Soft Required vs. Not Required Fields' below for details.

Minnie Mouse

Profile Location Programs Services Notes Assessments Files History Referrals

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

CLIENT PROFILE Contra Costa Profile Screen

Social Security Number XXX - XX - 1111

Quality of SSN Approximate or partial SSN reported

Last Name Mouse

First Name

Quality of Name Full name reported

Quality of DOB Full DOB Reported

Date of Birth 01/01/2001 Child. Age: 16

Unique Identifier F6BF88B41

Household Members Manage

Jon Snow Son

Johnny Test Son *

Active Programs

test

Required vs. Soft Required vs. Not Required Fields

The dynamic intake forms powered by Clarity provide many flexible features. Individual data elements can be Required, Soft Required or Not Required.

Required Fields

The data element must be completed: you cannot save the page unless a value is set. A Red banner is set across the top of the page, and the data element is outlined in Red.

In the example below, 'Parental Status' is a required field. When the user did not complete the field...

Alias

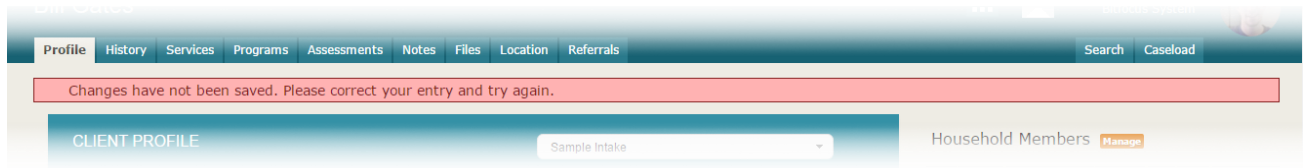
Parental Status Select

Children in Household 2

Recent Services

Housing:

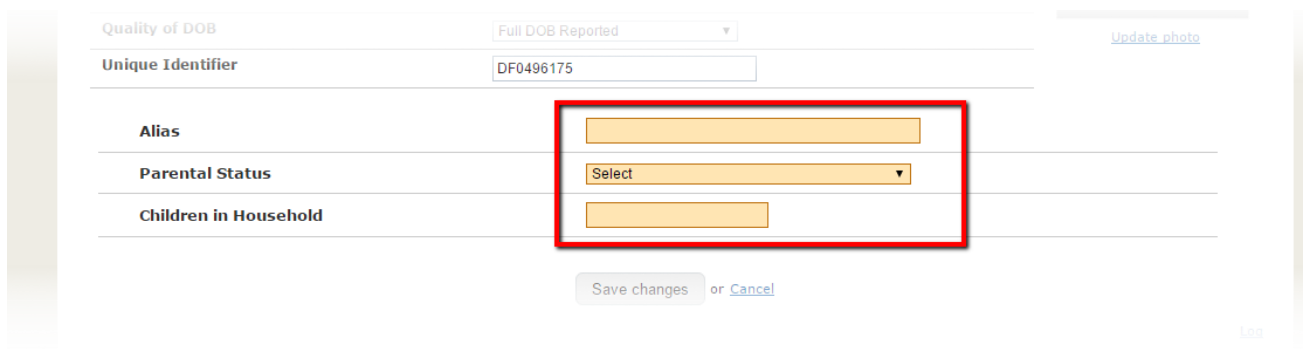
...a red warning bar displayed at the top of the screen when the screen is saved....



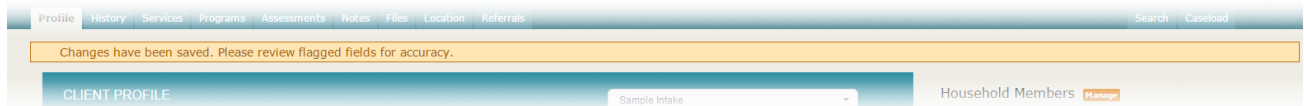
Soft Required Fields

The data element is optional, but highly recommended. The data will save and allow you to continue, but a Yellow banner will appear, as well as the field in question will be outlined in Yellow.

In the example below, the 'Children in Household' field is a 'Soft Required' field. When it was left blank, the field category turned yellow.



And this warning appeared at the top of the page...



Not Required Fields

The data element is requested as part of the form, but is completely optional for data entry. No notice is provided.

Dynamic Elements

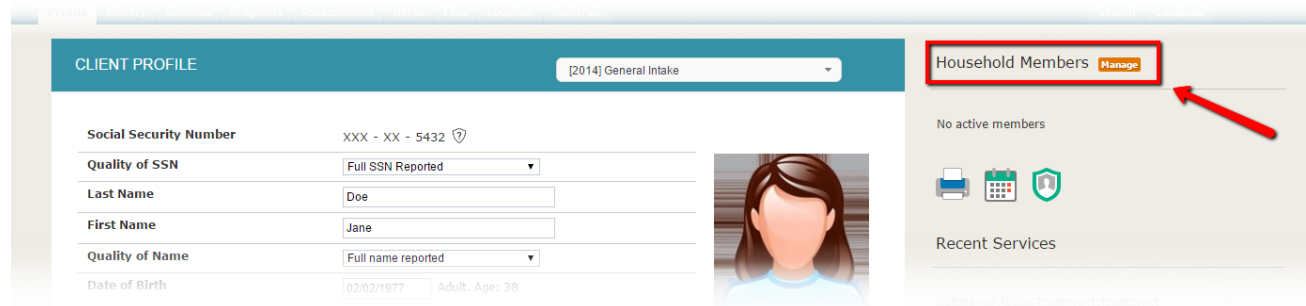
As you complete data intake, you may be presented with dynamic data elements. For example, clicking "Yes" to Veteran Status may automatically expand the form to display additional Veteran questions, or setting your client to Female may automatically display an

additional Pregnancy question. These types of example questions are completely custom to each implementation, but standard data entry rules as stated above will apply.

After completing all necessary fields, and click “**Add Record**” at the bottom of the page to create.

Adding Household Members

By default, a newly created client will not be a member of a Family or Household. While on any tab within a Client profile, the “Family/Household Members” section will be listed at the top of the right sidebar. This section will list any active Family/Household members for this client. In order to manage the Family/Household members, simply click the orange “Manage” button beside the section title.



1. Click **MANAGE** Household Members

The Family/Household management section allows two very convenient ways to add new members to your Family/Household, as well as manage program participation and service placement for the entire group. Both methods provide a convenient method of linking clients to programs and services.

These methods are:

1. Quick Add/Join Functionality from the Side Bar
2. Client Search

Quick Add/Join Functionality from the Side Bar

1. Select the “**Manage**” icon/link at the top of the right sidebar.

This will take you to the Family/Household Management search screen.

Jane Doe

Profile History Services Programs Assessments Notes Files Location Referrals

Landen Scott, Bitfocus System

Search Caseload

HOUSEHOLD MANAGEMENT

Search for a Household Member

Search

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

Previous Household History for

Head of Household	Members	Start	End
Jane Doe	0	06/20/12	12/01/15

[Back](#)

Managed with Clarity Human Services

Household Members

No active members

Your recent client searches accessed:

John Doe	6789
Antonio Gates	1111
Kevin Doe	0000
Bill Gates	1222
Frodo Baggins	6789

Landen Scott 2222

Within the right sidebar, your 10 most recently accessed clients will appear under the section titled “Your recent client searches accessed”. Generally, family/household members are added to the system sequentially, therefore they will likely be conveniently listed here.

HOUSEHOLD MANAGEMENT

Search for a Household Member

Search

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

Previous Household History for

Head of Household	Members	Start	End
Jane Doe	0	06/20/12	12/01/15

[Back](#)

Managed with Clarity Human Services

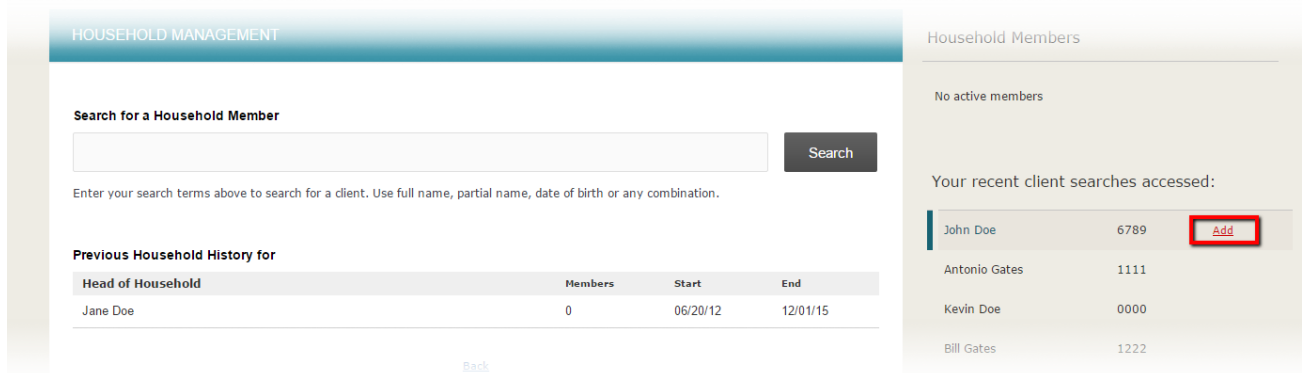
Household Members

No active members

Your recent client searches accessed:

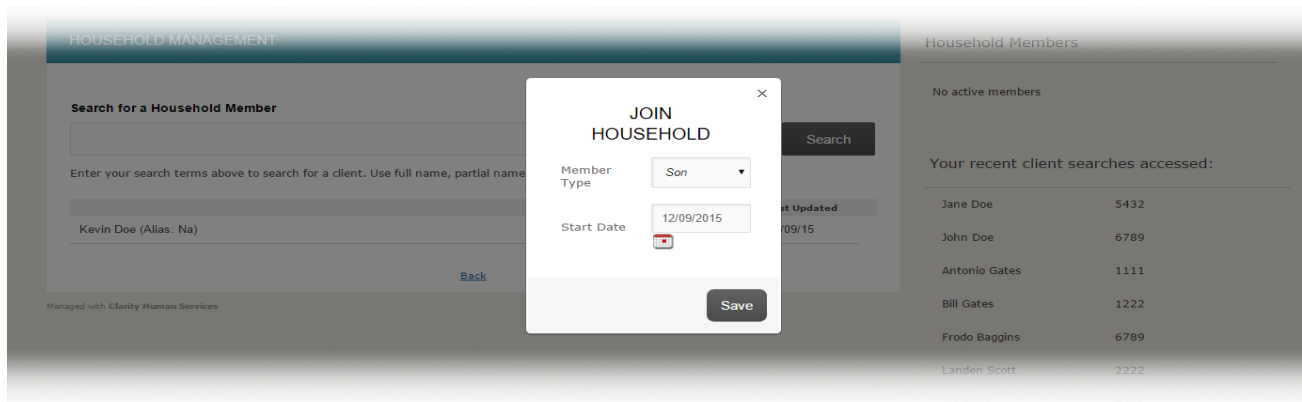
John Doe	6789
Antonio Gates	1111
Kevin Doe	0000
Bill Gates	1222
Frodo Baggins	6789
Landen Scott	2222
Joe Miles	2221
Bilbo Baggins	1230

Clients that currently are not members of any Family/Household will be listed with the “Add” option when you hover over their name.



This is the most common scenario when adding members to a Family/Household.

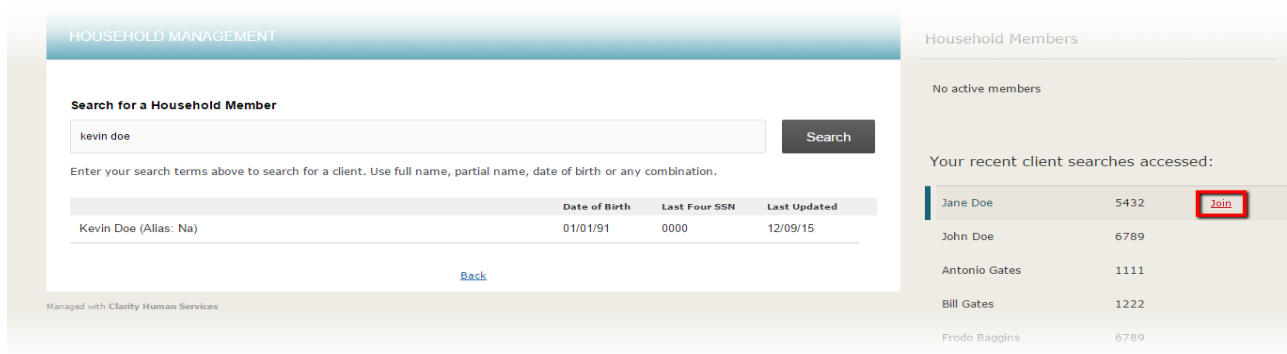
1. Selecting “Add” will display a window
2. Enter **Member Type**
3. Enter **Start Date**.
4. Click **Save**



This client will be successfully added to the family/household.

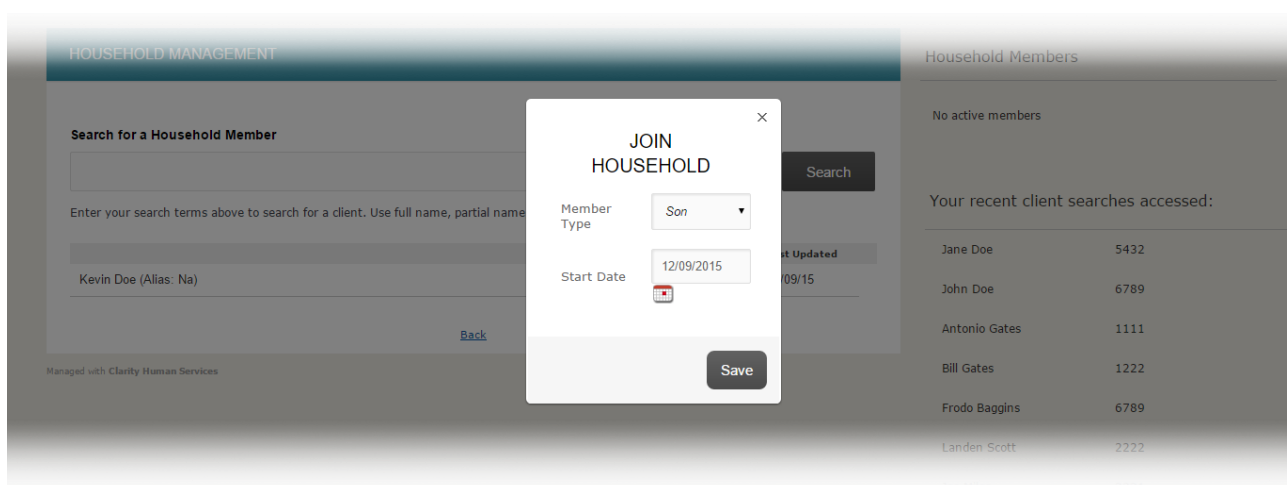
Join

When the client you are working with is not a member of another client’s household, “Join” will be displayed next to the other client’s name. In the example below, Kevin Doe is not yet added to the “Doe” family/household. However, the option to join both Jane Doe or John Doe’s family/household (which happens to be the same in this example) is available by selecting the “Join” link to the right of their names.



The Join option allows for two unique functions based on the Family/Household status of the current client:

Scenario 1. Current client has no active Family/Household members: This option allows the current client to join an existing Family/Household.



Scenario 2. Current client is already a member of a Family/Household: In this unique circumstance, Clarity allows you to make a decision.

- a.) *Would you like to have your current client leave their existing Family/Household to join another Client's Family/Household? If so, select 'Join'.*

HOUSEHOLD MANAGEMENT

Search for a Household Member

Search box: kevin doe [Search]

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

	Date of Birth	Last Four SSN	Last Updated
Kevin Doe (Alias: Na)	01/01/91	0000	12/09/15

Existing Group, Head of Household: Jane Doe. Members: 3

Household History

	Member Type	Member Start	Member End
Bill Gates	Father	12/08/15	12/09/15

Household Members

- Antonio Gates - Son
- Bill Gates - Father *

Your recent client searches accessed:

Kevin Doe	0000	Join
Jane Doe	5432	
John Doe	6789	
Frodo Baggins	6789	

When you select 'Join' you will see the following popup box:

JOIN HOUSEHOLD

Active client is already in a Household. This action will end involvement in the current group and add as a member of the selected group.

Leave existing Household to join Kevin Doe's Household
 Transfer Kevin Doe from their existing Household to this Household

Existing Household

Existing End Date: 12/10/2015

New Household

Member Type: Other

Start Date: 12/10/2015

[Save]

b.) Would you like to transfer another client from their current Family/Household into your active client's Family/Household? If so, select '**Add**'.

The screenshot shows the 'HOUSEHOLD MANAGEMENT' interface. On the left, there is a search bar with the text 'Search for a Household Member' and a 'Search' button. Below the search bar, there is a table titled 'Household History' with columns for Member Type, Member Start, and Member End. The table shows 'Bill Gates' as a Father from 12/08/15 to 12/09/15. Below this is another table titled 'Previous Household History for' with columns for Head of Household, Members, Start, and End. It shows 'Bill Gates' as the Head of Household with 3 members from 12/08/15 to 12/09/15, and 'Jane Doe' as the Head of Household with 3 members from 12/09/15 to 12/09/15. On the right side, there is a 'Household Members' section with a list of members: Antonio Gates (Son), Bill Gates (Father *), and Norman Gates (Son). Below this is a section titled 'Your recent client searches accessed:' with a list of names and IDs: Kevin Doe (0000), Jane Doe (5432), John Doe (6789), Antonio Gates (1111), Frodo Baggins (6789), Landen Scott (2222), Joe Miles (2221), and Bilbo Baggins (1230). A red arrow points to the 'Add' button next to Landen Scott.

2. Client Search

Using the same Add and Join functionality stated above, the Client Search function allows you to search the entire client database for a matching family member to join to your client’s Family/Household group. A couple additional items are displayed in the Search results if the target client is found. These items include the existing group’s Head of Household, and the number of members in that Family/Household.

The screenshot shows the 'HOUSEHOLD MANAGEMENT' interface. On the left, there is a search bar with the text 'Search for a Household Member' and a 'Search' button. The search bar contains the text 'norman gates'. Below the search bar, there is a table with columns for Name, Date of Birth, Last Four SSN, and Last Updated. The table shows 'Norman Gates' with a Date of Birth of 01/02/93, Last Four SSN of 2142, and Last Updated of 12/09/15. A red box highlights the 'Add' button next to Norman Gates. Below this is a table titled 'Household History' with columns for Member Type, Member Start, and Member End. The table shows 'Bill Gates' as a Father from 12/08/15 to 12/09/15. On the right side, there is a 'Household Members' section with a list of members: Antonio Gates (Son), Bill Gates (Father *), and Norman Gates (Son). Below this is a section titled 'Your recent client searches accessed:' with a list of names and IDs: Norman Gates (2142), Kevin Doe (0000), Jane Doe (5432), and John Doe (6789).

Ending a Client’s Family/Household Membership

Circumstances may arise when a Family/Household member needs to be removed from the group. To accomplish this task,

1. Simply click the “**Edit**” link beside any group member the “Family/Household Members” section.

2. Check the **Exited Household box**
3. Exited Household field, **enter the date** you wish to stop the client's participation in the group.

After the date has passed, the client will automatically be removed from the group and listed in the Family/Household History section.

The screenshot displays the 'HOUSEHOLD MANAGEMENT' interface. On the left, a search bar contains 'norman gates' and a 'Search' button. Below it, a table lists search results for 'Norman Gates' with columns for 'Date of Birth', 'Last Four SSN', and 'Last Updated'. On the right, the 'Household Members' section shows a list of members: Antonio Gates (Son), Bill Gates (Father *), and Norman Gates (Son). A red box highlights an edit icon next to Antonio Gates. In the foreground, an 'EDIT' modal is open, showing fields for 'Member Type' (Son), 'Head of Household' (Bill Gates), 'Joined Household' (12/08/2015), and 'Exited Household' (checked, 12/16/2015). A red arrow points to the 'Exited Household' checkbox.

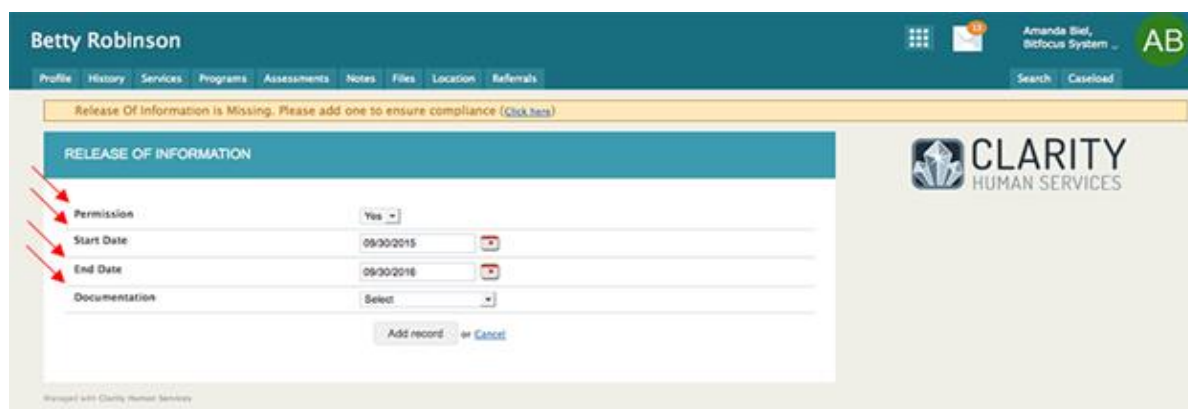
Release of Information

This feature ensures that a signed Release of Information (ROI) is always on file and up-to-date in each client record. It makes the ROI forms easy for the end user to access and store, and it also tracks expiration dates to ensure that the ROI form in each client record is current.

Managing ROI forms within Existing Client Profiles

A compliance warning ribbon will appear across the screen of any client profile that has an expired ROI form, or an ROI form that is about to expire.

1. Select the '**Click Here**' link to update the ROI.



The screenshot shows the client profile for Betty Robinson. At the top, there is a navigation bar with tabs for Profile, History, Services, Programs, Assessments, Notes, Files, Location, and Referrals. A yellow warning banner at the top of the main content area reads: "Release Of Information is Missing. Please add one to ensure compliance (Click here)". Below this, the "RELEASE OF INFORMATION" form is displayed. The form has four fields: "Permission" (a dropdown menu set to "Yes"), "Start Date" (a date picker set to 09/00/2015), "End Date" (a date picker set to 09/00/2016), and "Documentation" (a dropdown menu set to "Select"). Red arrows point to each of these four fields. At the bottom of the form are "Add record" and "Cancel" buttons. The Clarity Human Services logo is visible on the right side of the page.

The Release of Information Screen will appear.

2. **Complete** the following data fields:
3. Enter **Permission**
 - **Yes** = Client provided consent
 - **No** = Client did not provide consent
4. Enter **Start Date**
 - This is the date that the client signed the ROI. The 'Start Date' defaults to today's date, but it must be configured to reflect the actual date the ROI was signed by the client, if it was not signed on the current day.
5. Enter **End Date**
 - This is the date that the ROI will expire. It will default to the expiration date configured by the HMIS System Administrator.
6. Enter **Documentation**

Enter the way in which the ROI was stored. There are several options listed:

- **Electronic Signature:** If Electronic Signature is selected, a black button stating 'e-Sign Document' will be present. Click on it to “**complete the electronic signature form**”. The client can sign the form with their finger/stylus.
 - **Attached PDF** – This will prompt the end user to upload the PDF, which must have the client signature.
 - **Signed Paper Consent or Outside Agency Verified** – Enter your location in the 'Location' text box that appears.
 - **Verbal Consent** – Select if consent was verbally given by the client.
 - **Household or Group Member** – Select if the client is a minor and an adult household/group member signed the ROI.
 - **None** – Select if no ROI was obtained.
7. Select '**Add Record**' once all data fields are complete.
 8. Verify the form uploaded correctly: click on the “**Shield**” icon, next to the client calendar and print icons. This will open the Release of Information screen and you can review the form on this screen.

**Note: Only one ROI per agency per active start/end date range is permitted. The system will not allow you to upload a second ROI within the same date range.*

Agency Name	Permission	Type	Start Date	End Date
Bitfocus System	Yes	Electronic Signature	09/30/2015	09/30/2016

Once the completed ROI has been uploaded, the Warning Ribbon on the client's profile will be removed, and will only prompt when the ROI expires.

Managing ROI forms when creating a new Client Profile

1. Select the **CREATE NEW CLIENT** icon on the upper right corner of the Search Screen.
2. Create a New Client Screen opens, the Release of Information box will be located at the top right of the screen.

Enter the ROI information in the Release of Information box using the instructions listed in the Managing ROI forms within Existing Client Profiles section above.

The screenshot shows the Bitfocus System interface for creating a new client. The main form is titled 'CREATE A NEW CLIENT' and includes fields for Social Security Number, Quality of SSN, Last Name, First Name, Quality of Name, and Date of Birth. A red box highlights the 'RELEASE OF INFORMATION' section, which contains the following fields:

Field	Value
Permission	Yes
Start Date	09/30/2015
End Date	09/30/2016
Documentation	Select

Note: The Client Profile screen will not save until the Release of Information box is completed.

Client Location Addresses

To manage client address information,

1. Select the **Location tab** in the Client Record.

The screenshot shows the Bitfocus System interface for managing client location addresses. The main form is titled 'CLIENT LOCATION' and includes an 'Add Address' button. A red arrow points to the 'Location' tab in the navigation menu. The sidebar on the right shows the following information:

Household Members	Relationship
Antonio Gates	Son
Norman Gates	Son

Active Services:

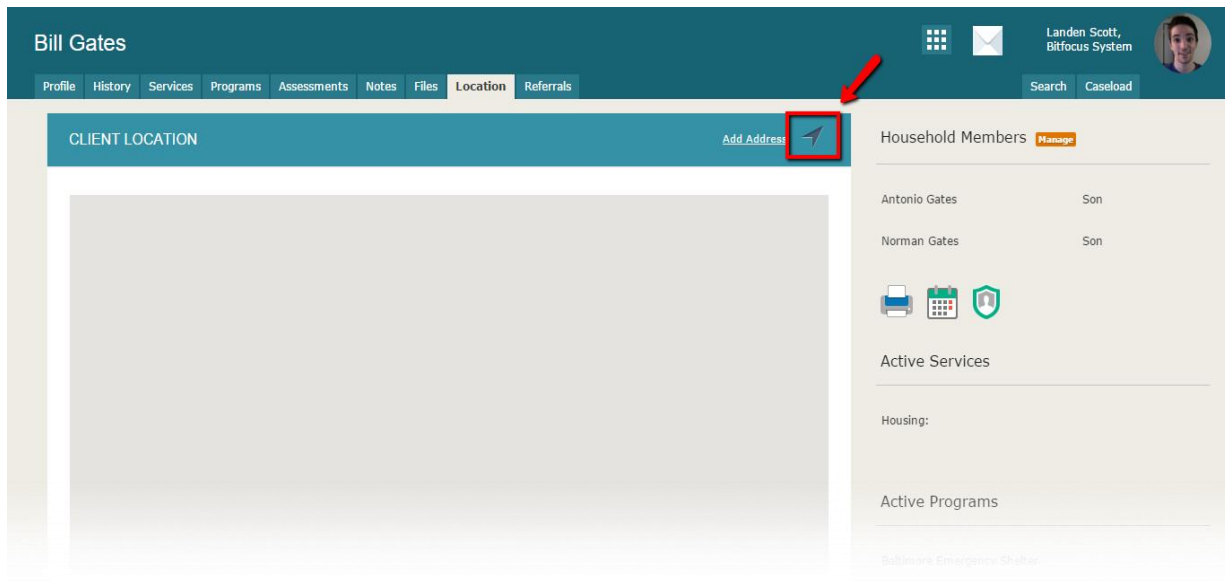
- Housing:
- Active Programs: Baltimore Emergency Shelter

From here you can add a new address by two methods.

Method 1:

If your current location is the address you wish to enter.

1. Select the **LOCATING ARROW** at the top right corner of the screen. This feature will then use Google Maps to determine your location.



After selecting the locating arrow,

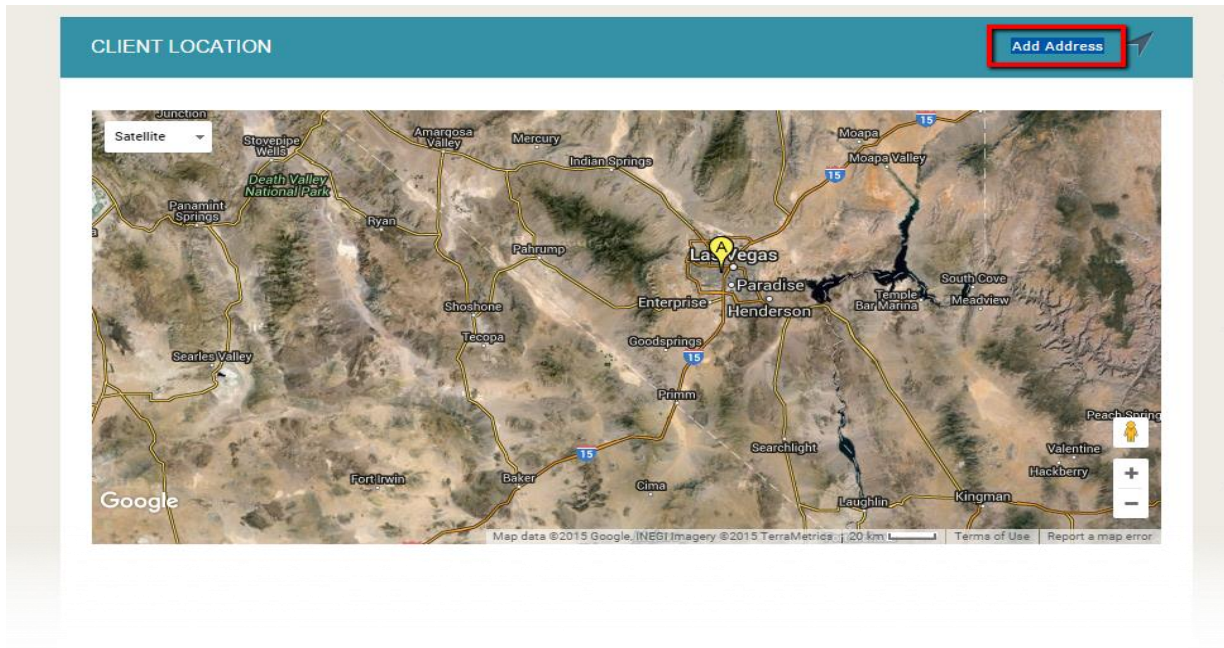
2. Auto-fill the address information by selecting the '**Field Interactions**' link.



This feature is particularly helpful when you are in the field and need to enter your current location.

Method 2:

1. Click the 'Add Address' link in the top right corner of the Location tab.



2. This will open the **Client Location** screen.
3. You can enter the **Address information**.

A screenshot of the 'CLIENT LOCATION' form. The form is set against a teal header with the text 'CLIENT LOCATION'. Below the header, there is a navigation bar with tabs: Profile, History, Services, Programs, Assessments, Notes, Files, Location (selected), and Referrals. The form contains the following fields:

- Address Type: Home (dropdown)
- Name: [text input]
- Address (line 1): [text input]
- Address (line 2): [text input]
- City: [text input]
- State: NV - Nevada (dropdown)
- Zip Code: [text input]
- Email: [text input]
- Phone (#1): [text input]
- Phone (#2): [text input]
- Status:
- Private:

At the bottom of the form, there are two buttons: 'Add record' and 'Cancel'.

- **Status** – When checked, it is considered an Active address, otherwise it is Inactive
- **Private** – When checked, the record becomes Private and only your agency will have the ability to view the record. When unchecked, regular Sharing rules for your agency apply.

Profile History Services Programs Assessments Notes Files **Location** Referrals

CLIENT LOCATION

Address Type Home

Name _____

Address (line 1) _____

Address (line 2) _____

City _____

State NV - Nevada

Zip Code _____

Email _____

Phone (#1) _____

Phone (#2) _____

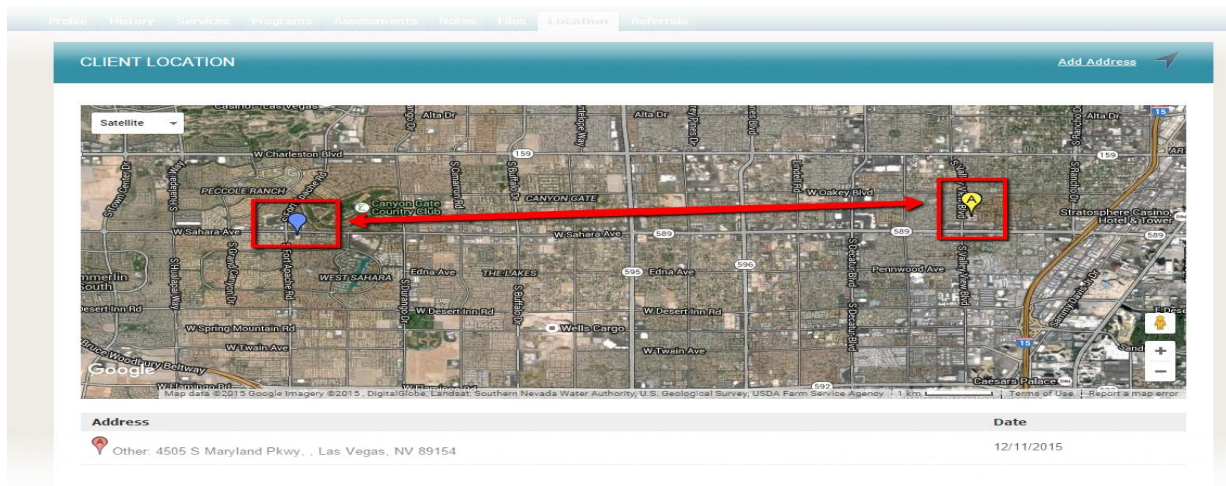
Status ←

Private →

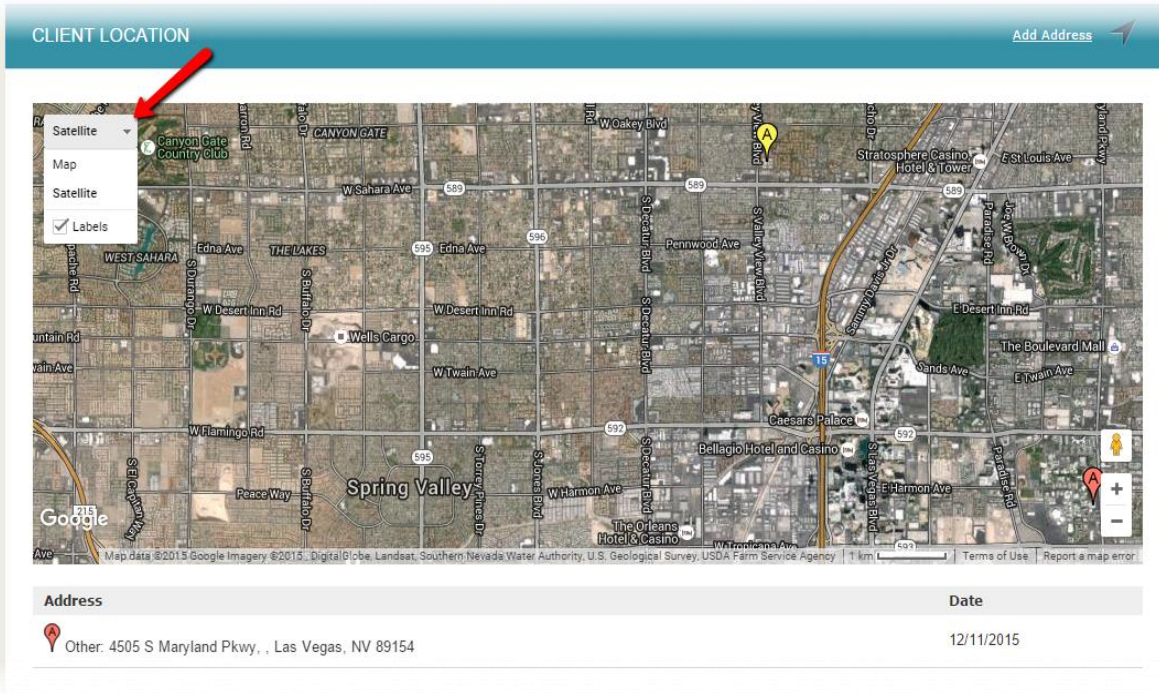
Add record or [Cancel](#)

Managed with Clarity Human Services

Once an address is uploaded with a valid zip code, the Location tab will show all active addresses plotted on the Map. The blue pin indicates the address of your Agency in relation to the plotted addresses.



The view of the map can also be changed from “Satellite” to “Map” if you prefer one over the other.



You can view the existing and previous addresses, or edit an address by clicking on **Edit/View** to the left of the existing address.

New Enrollment

How to enroll a client into a Program

To begin the program enrollment process, click on the Programs tab in the top menu of the client record. This area contains two sections:

1. Click on **Programs Tab**
2. Select **Programs Available**
3. Select the **down arrow** next to the applicable program
4. After selecting the down arrow, the section will drop down, providing additional information and options.

Program History

This section provides a listing of programs your client is either currently enrolled in, or has been enrolled in in the past. In the example below, Bill Gates is currently enrolled in two programs: Baltimore Emergency Shelter program and the Sample Program. He is active in both programs, as indicated by the word "Active" in green font.

The screenshot shows the 'PROGRAM HISTORY' section for client Bill Gates. The interface includes a navigation bar with tabs for Profile, History, Services, Programs, Assessments, Notes, Files, Location, and Referrals. The 'PROGRAM HISTORY' section is highlighted with a red border and contains the following table:

	Start Date	End Date	Type
Baltimore Emergency Shelter Bifocus System	12/08/2015	Active	Group
Sample Program Bifocus System	10/01/2015	Active	Group

Below the table is a section labeled 'PROGRAMS AVAILABLE'. To the right of the main content, there are sections for 'Household Members' (listing Norman Gates as Son) and 'Active Programs'.

Programs: Available

Below the Program History section is the Programs Available section. This section lists current programs provided by your agency that are available for client enrollment. Bill Gates has numerous programs that are available to him. A client may not have multiple open enrollments into the same program.

The screenshot shows the 'PROGRAMS AVAILABLE' section for client Bill Gates. The interface is similar to the previous screenshot, but the 'PROGRAMS AVAILABLE' section is highlighted with a red border and contains a list of programs with dropdown menus:

- Baltimore Housing Assistance (RETIRED (HPRP))
- Homeless to Home TH Program (Transitional Housing)
- Housing Status Testing (Services Only)
- Jenn TH test (Transitional Housing)
- Natalie: test hh program (Other)
- Permanent Supportive Housing Program (PH - Permanent Supportive Housing (disability required))
- Sanctuary Emergency Shelter (Emergency Shelter)

Other sections visible on the right include 'Household Members', 'Active Programs' (listing Baltimore Emergency Shelter and Sample Program), 'Recent Services' (listing Hot Meal: Hot Meal Dinner), and 'Assigned Staff'.

How to enroll a client/household into a program

1. Select the **down arrow** next to the applicable program title under “Programs: Available”.

The screenshot shows a software interface with a 'PROGRAMS: AVAILABLE' section highlighted by a red box. The section contains a list of programs, each with a button and a dropdown arrow. A red arrow points to the dropdown arrow next to the 'Homeless to Home TH Program'.

Program Name	Button Label	Dropdown Arrow
Baltimore Housing Assistance	RETIRED (HPRP)	▼
Homeless to Home TH Program	Transitional Housing	▼
Housing Status Testing	Services Only	▼
Jenn TH test	Transitional Housing	▼
Natalie: test hh program	Other	▼
Permanent Supportive Housing Program	PH - Permanent Supportive Housing (disability required)	▼
Sanctuary Emergency Shelter	Emergency Shelter	▼

The screenshot shows the details page for the 'Homeless to Home TH Program'. It includes a program description, active clients, occupancy, funding source, and service categories.

PROGRAM DESCRIPTION:
Transitional Housing Helping clients to transition from Homeless to having a home. Several services to help clients get back to having permanent shelter

Active Clients: 69 CLIENTS
30 % Families
70 % Individuals

Occupancy (Today): 2 UNITS
2 % Checked In
98 % Available

Funding Source: N/A

Service Categories: Food Housing

HOUSING AVAILABILITY:

- H2H Transitional Housing: Individual 30 Beds
- H2H Transitional Housing: Family 30 Beds in 5 Units
- Sanctuary Emergency Shelter: Individual Bed 50 Beds
- Sanctuary Emergency Shelter: Family Beds 100 Beds in 10 Units

Program Description = The program description provides a brief overview of the program, typically including the target population(s) and general service(s).

Program Type = This indicates the program type (e.g. Transitional Housing, Emergency Shelter, etc.).

Service Categories = This section indicates the categories of the different services this program provides (e.g. [APR] Transportation, [QPR] Rental Assistance).

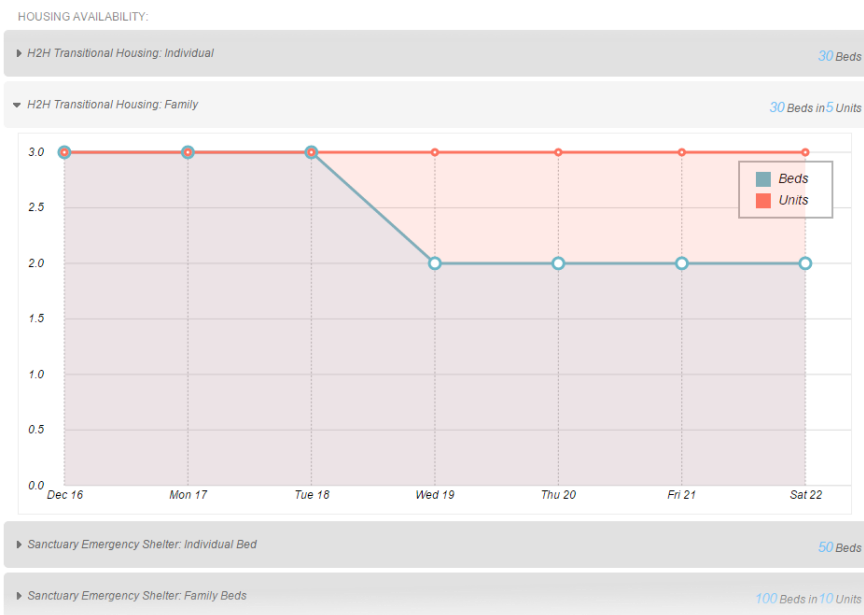
Housing Availability = This section indicates the type and amount of housing available, should housing be applicable to the program. If you select the arrow, a graph will drop down, indicating how many beds and units are currently available.

The screenshot displays a web interface for program configuration. At the top, there are sections for 'Funding Source' (N/A) and 'Service Categories' (Food and Housing). Below this is a 'HOUSING AVAILABILITY' section with a list of options. A red arrow points to the 'H2H Transitional Housing: Family' option, which is highlighted with a red box. The options are as follows:

Housing Option	Availability
H2H Transitional Housing: Individual	30 Beds
H2H Transitional Housing: Family	30 Beds in 5 Units
Sanctuary Emergency Shelter: Individual Bed	50 Beds
Sanctuary Emergency Shelter: Family Beds	100 Beds in 10 Units

At the bottom, there is a checkbox for 'Include group members' and a 'Save' button.

For programs with family housing options available, there will be two columns: Beds and Units (see below). Beds correspond to the number of individual persons in beds. Units correspond to the number of units available. This is particularly useful when enrolling households with children.



a. Household Enrollment Option

If your client is part of a household/family, you will be automatically prompted to select family/household members to include in the program. It is important to note that family/household members should be previously grouped with your client.

- Check the **box(es)** next to the family member(s) who should be enrolled in the program.

Bill Gates

Profile History Services **Programs** Assessments Notes Files Location Referrals Search Caseload

Funding Source: N/A

Service Categories: Food Housing

HOUSING AVAILABILITY:

- ▶ H2H Transitional Housing: Individual 30 Beds
- ▶ H2H Transitional Housing: Family 30 Beds in 5 Units
- ▶ Sanctuary Emergency Shelter: Individual Bed 50 Beds
- ▶ Sanctuary Emergency Shelter: Family Beds 100 Beds in 10 Units

Include group members:

Norman Gates Son

Print Directions Doc Requirements Enroll

Housing Status Testing

b. Referral Checkbox

If the program enrollment is conducted as a result of a referral, a checkbox will appear:

The screenshot shows a web interface for program enrollment. At the top, it displays 'HOUSING AVAILABILITY:' with a dropdown menu showing '[CMHA Training] Attendance Service: Training' and '15 Beds in 15 Units'. Below this, a red notification box states '1 pending referral(s). Oldest 0 days.' The main form area contains a checkbox labeled 'Program Placement a result of Referral provided by Bitfocus System', which is checked and highlighted with a red box. To the right, there is a section for 'Include group members:' with a checkbox for 'Norman Gates' and the label 'Son'. At the bottom of the form, there are three buttons: 'Print Directions', 'Doc Requirements', and 'Enroll'.

Selecting the checkbox will make the system automatically include the referral in the client's Program History. This allows users to easily identify whether a program placement is due to a referral.

The screenshot shows a client profile for 'Bill Gates' with a navigation menu including Profile, History, Services, Programs, Assessments, Notes, Files, Location, and Referrals. A yellow banner at the top indicates 'Release Of Information is Missing. Please add one to ensure compliance (click here)'. The main content area is titled 'PROGRAM: TRANSITIONAL HOUSING' and includes tabs for Enrollment, History, Provide Services, Assessments, Goals, Notes, Files, and Forms. A 'Program Service History' table is displayed, with a red arrow pointing to the first entry: 'Referral: Transitional Housing' with a start date of 12/22/2015 and an end date of 12/22/2015. To the right, a sidebar shows '1 DAYS ACTIVE PROGRAM' with details: Program Type: Group (2), Program Start Date: 12/22/2015, Assigned Staff: Landen Scott, and Head of Household: Bill Gates. Below this, 'Program Group Members' lists 'Norman Gates' with a start date of 12/22/15 and a status of 'Active'.

c. Print Directions

- Select the “**Print Directions**” icon will allow you to print directions to the program site from your current location or an alternate location. These directions can be programmed to be by car, foot, bicycle, or bus

d. Print Checklist

- Select the “**Print Checklist**” icon will allow you to print a checklist of all required documents that the client needs to enter the program.

Enroll

After clicking **Enroll**, you will be taken to the Program Enrollment page for your *original* client. This page will present program specific data elements necessary to complete program enrollment.

*** NOTE: If you are enrolling other household/family members, there will be a “Save and Next” button. Selecting this will enroll the current member, and automatically take you to the correct program enrollment screen for the next member.*

The screenshot shows a web application interface for enrolling a client named Bill Gates. The main form is titled "Enroll Program for client Bill Gates" and contains several input fields: "Program Entry Date" (with a date picker), "Test Label" (text input), "Pregnancy Due Date" (with a date picker), "Date of Lease" (with a date picker), and "Prior State" (with a dropdown menu). At the bottom of the form, there are buttons for "Save & Close" and "Cancel". A red arrow points to the "Save & Close" button. On the right side, there is a sidebar titled "ENROLLING PROGRAM" with the following information: "Program Type: Individual", "Assigned Staff: ", and "Head of Household:". Below this, there is a section for "Program Group Members" which currently shows "No active members". The top navigation bar includes "Bill Gates" and various menu items like "Profile", "History", "Services", "Programs", "Assessments", "Notes", "Files", "Location", and "Referrals".

Enrolled group members will be listed in the right side bar under “Program Group Members”.

Group Enrollment & Summary of Actions

When enrolling members of a household, a Summary of Actions popup will appear (after the last household member is enrolled) this scrollable page lists each program member (from the household) along with a list of all actions that were conducted automatically upon enrollment.

Existing Enrollment

Program Based Services

This section discusses how to link a Program Services to a client's record, including how to edit and/or view Program Services and apply the program services to household members.

In order to provide a Program Based Service Transaction:

1. Click on the **"PROGRAMS"** tab from the top menu list.
2. Access the program you wish to add services to by clicking **"Edit"**.

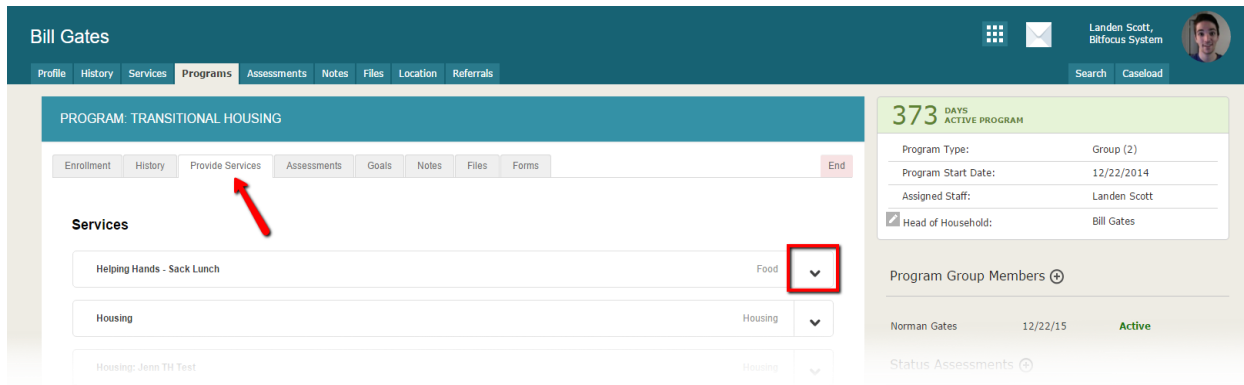
The screenshot shows the 'Bill Gates' client record in a software interface. The 'Programs' tab is selected in the top navigation bar. Below the navigation bar, there is a 'PROGRAM HISTORY' table with the following data:

	Start Date	End Date	Type
Baltimore Housing Assistance Biblocus System	12/22/2015	Active	Group
Homeless to Home TH Program Biblocus System	12/22/2015	Active	Individual
Baltimore Emergency Shelter Biblocus System	12/08/2015	12/08/2015	Group
Sample Program Biblocus System	10/01/2015	Active	Group
Transitional Housing [ANNA] Report Testing Agency	12/22/2014	Active	Group

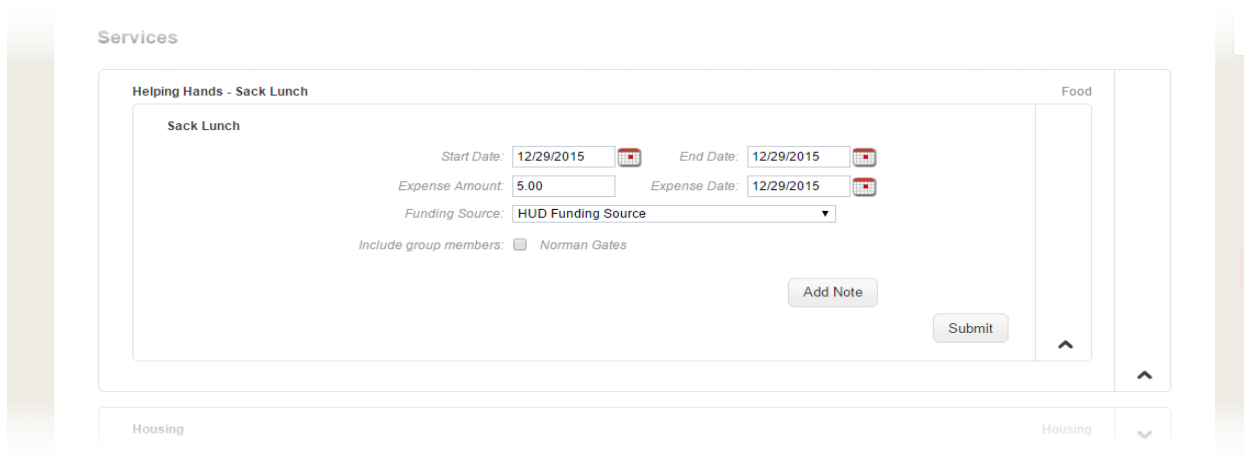
A red arrow points to the 'Edit' button (a small square with a downward arrow) located at the bottom left of the 'Transitional Housing' row. To the right of the table, there are sections for 'Household Members' (listing Norman Gates and Antonio Gates) and 'Active Services' (listing [BALT] Rental Assistance:Rental...).

1. Select the **'PROVIDE SERVICES'** tab place a program service for your client.
2. Select the **DOWN ARROW** (square below) to provide the program service.

On the Provide Services tab you will find a complete list of services your agency or organization is setup to provide within the selected Program. The example service list below is strictly for demonstration purposes. Your service list will be completely customized to your agency's requirements.



3. After selecting the down arrow, a dropdown screen will appear, providing information about the program service



You can alter the Start Date and End Date by clicking the calendar and modifying the dates.

It is also possible to enter a service note by selecting the **'Add Note'** button. Enter the note into the text box that appears. Notice that you can format the note using the formatting buttons at the top of the text box.

Once the correct dates are applied, and a service note is entered (if necessary) select **'Submit'**.

Services

Helping Hands - Sack Lunch Food

Sack Lunch

Start Date: 12/29/2015 End Date: 12/29/2015

Expense Amount: 5.00 Expense Date: 12/29/2015

Funding Source: HUD Funding Source

Include group members: Norman Gates

Add Note Submit

Service Transaction with Family/Household Members

A service can be configured to allow other members of the client's Family/Household to also receive the program service transaction.

If the program service is equipped with this feature, a section will appear asking "Include group members:" followed by a list of active members in your client's Family/Household group. Check the additional members you would also like to receive this program service, and they will automatically be placed with the service transaction as well.

Services

Helping Hands - Sack Lunch Food

Sack Lunch

Start Date: 12/29/2015 End Date: 12/29/2015

Expense Amount: 5.00 Expense Date: 12/29/2015

Funding Source: HUD Funding Source

Include group members: Norman Gates

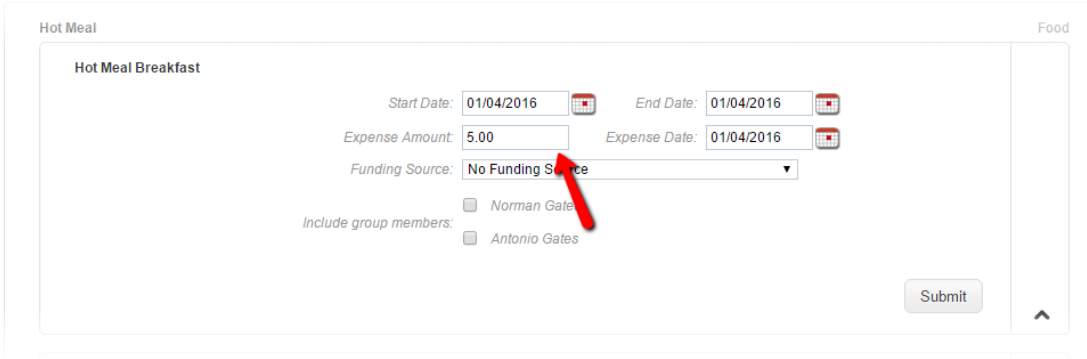
Add Note Submit

The Service will then be documented in the History tab of every Family/Household member who received it.

Service Transaction with Expense

Some services will be accompanied with an expense amount. In this scenario, you are requested to provide an Expense Amount, Expense Date, and Funding Source.

- **Expense Amount:** Depending on the setup of the service, this may be either an adjustable, or a pre-determined amount that cannot be modified.
- **Expense Date:** The date the expense was issued.
- **Funding Source:** Depending on the setup of the service, this may be adjustable, or automatically set to a pre-determined funding source.



The screenshot shows a web form for a 'Hot Meal' service. The form is titled 'Hot Meal Breakfast' and is part of a larger 'Hot Meal' section. It contains the following fields and options:

- Start Date:** 01/04/2016 (with a calendar icon)
- End Date:** 01/04/2016 (with a calendar icon)
- Expense Amount:** 5.00
- Expense Date:** 01/04/2016 (with a calendar icon)
- Funding Source:** A dropdown menu currently set to 'No Funding Source'. A red arrow points to this dropdown.
- Include group members:** Two checkboxes are present: 'Norman Gates' and 'Antonio Gates', both of which are unchecked.
- Submit:** A button located at the bottom right of the form.

A group placement option may be configured to either provide *all* checked Family/Household members with an identical expense amount, or to only apply the expense placement to the primary client.

Service Transaction – Time Based and Time Tracking

Service Transactions with the potential for access more than once a day can be Time based. These types of services will ask for a Start Date, and then by clicking on the Clock icon, open a Time dialogue requesting the Hour and Minute of the service.

The screenshot shows a service tracking interface. At the top, there is a dropdown menu with 'outreach' selected and 'Outreach and Engagement' displayed. Below this is a section titled 'Phone Use' with a 'No Category' label. The 'Phone' service is selected. The 'Date' is set to '12/29/2015' and the 'Time' is '00:00'. A red arrow points to the time selection dropdown, which is open, showing a 'Choose Time' dialog with 'Time 00:00', 'Hour', and 'Minute' sliders. Below the time selection, there is a 'Submit' button. At the bottom of the 'Phone Use' section, there are 'Now' and 'Done' buttons. Below this is a section for 'ssvf service' with a 'VA SSVF Service' dropdown. At the very bottom, there is a 'Time Tracking' section with a 'Case Management' dropdown.

Some services can also be time tracked. Most often used with “Case Management” services, this function allows you to keep track of how much time has been spent performing that specific service. Simply select the amount of time that you would like to track. Then click “**Submit**”.

The screenshot shows a service tracking interface for 'Case Management'. The 'Case Management' service is selected. The 'Start Date' is '01/01/2016' and the 'End Date' is '01/04/2016'. The 'Time Tracking' is set to '1 hour' and '15 min'. Below this, there are checkboxes for 'Include group members' with 'Norman Gates' and 'Antonio Gates' listed. At the bottom right, there are 'Add Note' and 'Submit' buttons.

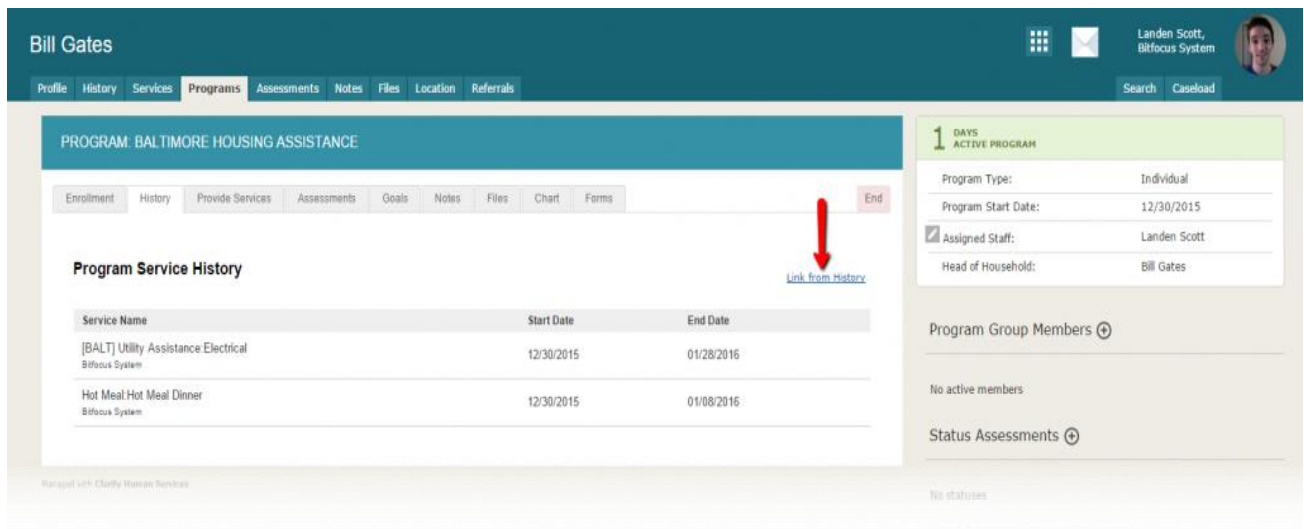
No matter the type of service, clicking “**Submit**” will automatically provide the intended clients with the Service Transaction without reloading the page. You are then free to provide the next service, all from the single interface.

How to link a service to a program

If a program-based service accidentally is created in a general service tab, this section discusses how to link that service to a program.

To link a program-based service to its associated program,

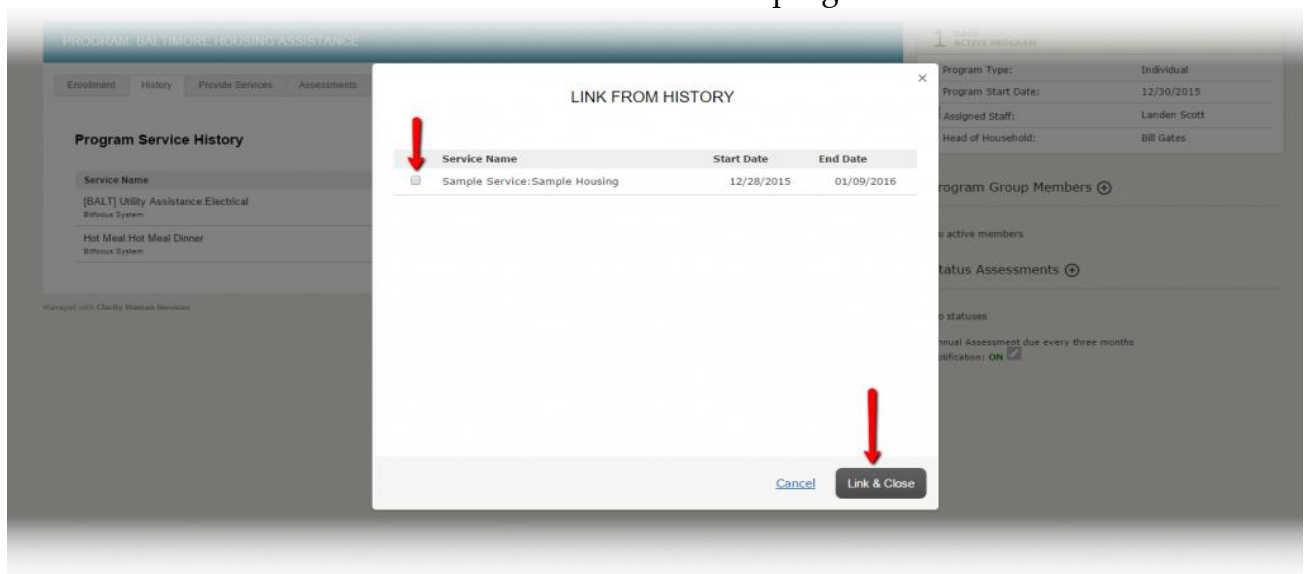
1. Go to the **Programs tab** and select the **“Edit”** link next to the Program.
2. Next, go to the **History subtab** and select the **“Link from History”** link.



3. Select the checkbox next to the service.

Note: that there may be more than one service. There may also be reservations listed here as well. This functionality also applies to reservations made outside of the Programs tab.

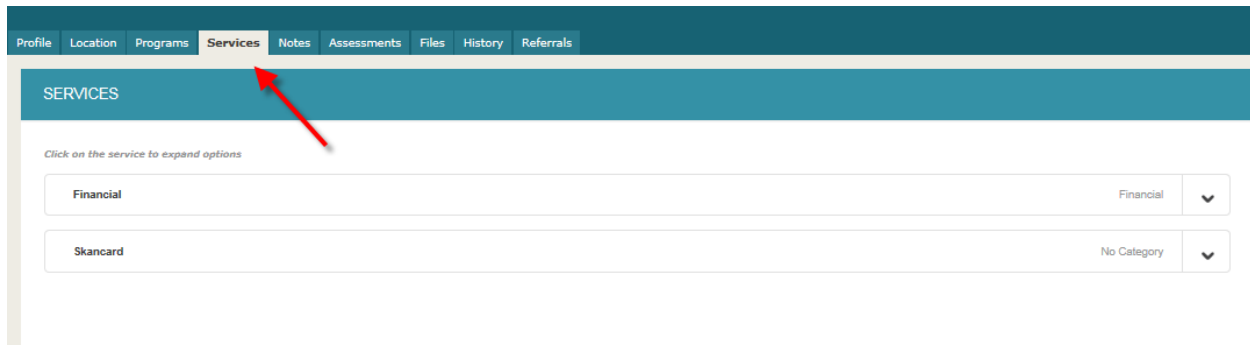
4. Select **“Link & Close”** to link the service to the program.



The service is now successfully linked to the program.

Non Program Based Services

Non program-based services are those that can be provided outside a program enrollment (which include services for a client enrolled.)



Profile Location Programs **SERVICES** Notes Assessments Files History Referrals

SERVICES

Click on the service to expand options

Financial	Financial	▼
Skancard	No Category	▼

Click on the **service** to expand options

Complete the Fields: Start Date, End Date etc..

Add Note

Click **Submit**

History

The History tab displays a list of all program activities including assessments, enrollment, services and referrals. You can edit and /or view active enrollment as well as closed enrollment.

Understanding History Tab Color Coding

Programs, services, assessments and referrals are color-coded to make them easy to distinguish from one another.

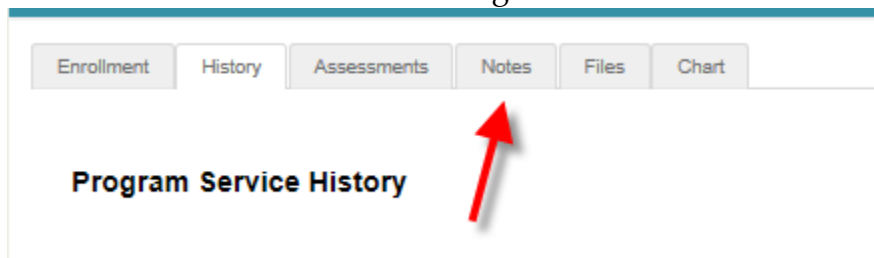
- Programs: Tan
- Services: White
- Assessments: Gray
- Referrals: Blue

HOW DO I CREATE CASE NOTES FOR MY CLIENTS?

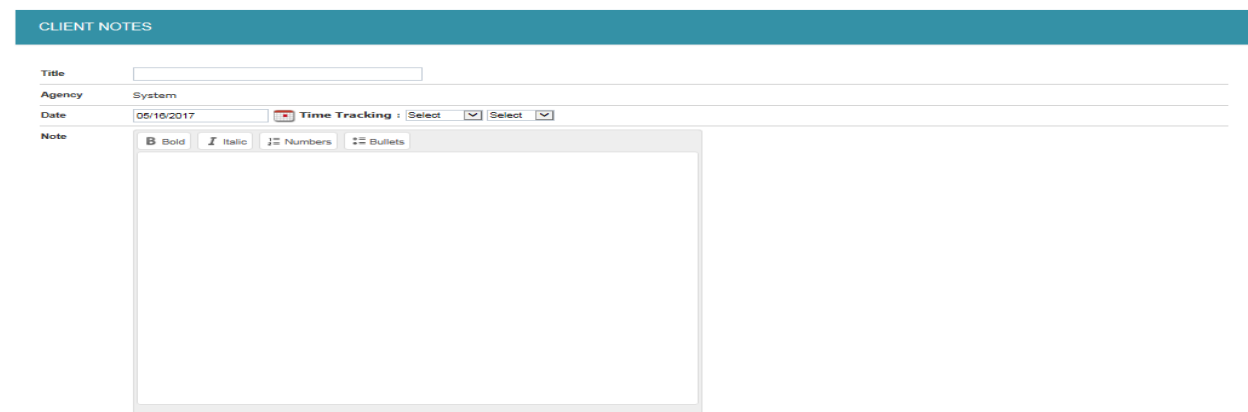
This section discusses how to manage case notes in a client record, including how to create and edit case notes.

Creating Client Case Note (Program based)

1. Select **Programs** Tab
2. Select **Edit** next to the program name
3. Select **Notes** Tab
4. Click on **Add Notes** on right side of screen



5. Enter Note

A screenshot of a form titled 'CLIENT NOTES'. The form has a teal header bar. Below the header, there are several input fields: 'Title' (empty), 'Agency' (set to 'System'), 'Date' (set to '05/16/2017'), and 'Time Tracking' (with two dropdown menus). Below these fields is a large text area for entering the note. Above the text area is a rich text editor toolbar with icons for Bold, Italic, Numbers, and Bullets.

6. Click on **Add record** to save note

Creating Client Notes (Non- Program based)

This is for general notes that can be shared across agencies.

1. Select **Notes** tab of client profile
2. Add Note by clicking **ADD NOTE** in the top right corner
3. Create a Title for your note
4. The click **ADD record** at the bottom of page.

Melinda Greensmith Amanda Biel, Clarity Test Agency [Switch] Reports | Calendar | Info | Logout

Profile | History | Services | Programs | Assessments | **Notes** | Files | Location Attendance Search

Client Notes [Add Note](#)

Title	Staff	Date
No records to display...		

Household Members [Manage](#)

Michael Greensmith	Son	Edit
Alex Greensmith	Husband	Edit
Amanda Greensmith	Daughter	Edit
Bobby Greensmith	Uncle	Edit

Carl Bentfender John Smith, Clarity Test Agency [Switch] Reports | My Info | Logout

Profile | History | Services | Programs | **Notes** | Files | Location Attendance Search

Client Notes

Title: Initial Interview with Carl

Agency: Clarity Test Agency

Date: 04/22/2012

Note:

Carl was assessed for eligibility for the Help Them Home program. It was determined the following documentation is required to determine his eligibility.

1. Employment Verification letter
2. Copy of his rental lease
3. Last year's tax return

Carl will be returning in two days after he has had an opportunity to collect the required documentation.

Family / Household Members [Manage](#)

No active members

Active Services

No active services

Active Programs

No active programs

Recent Services

No recent services

Click the **'PRIVATE'** checkbox located at the bottom left of the note will allow only users with qualified access roles to view the contents of the note.

Private

[Add record](#) or [Cancel](#)

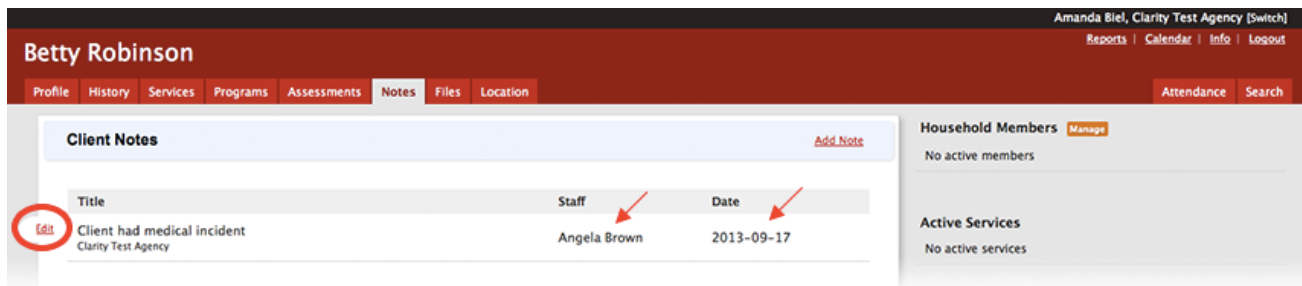
Managed with Clarity

Viewing/Modifying Client Notes

Depending on your access role, you may have the ability to either view and/or edit client notes created by other users.

To view and/or edit a client note.

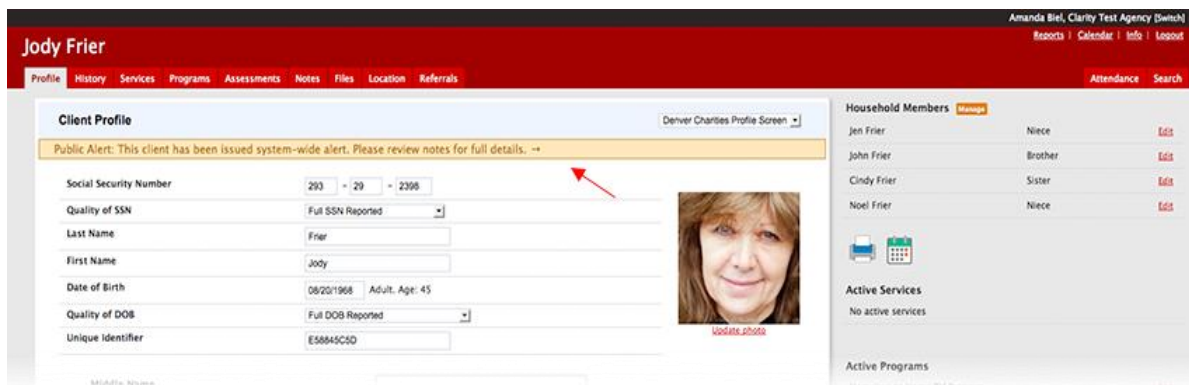
1. Click on **Notes tab**, mouseover the note title,
2. Select the **'Edit'** link that appears to the left.
3. **Edit Note**
4. Click **Save changes**



You can also view the staff member who created the note and the date upon which it was created/last modified.

How do I create a public alert?

This section discusses how to create Public Alerts. For situations when it is necessary to notify your agency or other agencies, a Public Alert can be created to appear on the client profile page.



To create a Public Alert, go to the Notes tab in the client profile and select 'Add Alert.'

Alex Greensmith

Profile History Services Programs Assessments **Notes** Files Location Referrals Attendance Search

Client Notes [Add Note](#)

Title	Staff	Date
Client had medical incident Clarity Test Agency	Angela Brown	08/27/2013

Public Alerts [Add Alert](#)

Title	Staff	Expires
No records to display...		

Household Members [Manage](#)

Michael Greensmith	Son	Edit
Amanda Greensmith	Daughter	Edit
Bobby Greensmith	Uncle	Edit
Melinda Greensmith	Wife	Edit
Bill Dunn	Grandchild	Edit
Bill Bender	Significant Other	Edit
Mike Dean	Uncle	Edit

Active Services

Case Management: Case Management	Edit
[BALT] Rental Assistance: Rental...	View

Enter the Public Alert name, expiration date, followed by a note explaining the nature of the alert. (The Agency field will be automatically entered)

Alex Greensmith

Profile History Services Programs Assessments **Notes** Files Location Referrals Attendance Search

Client Notes [Add Note](#)

Title	Staff	Date
Client had medical incident Clarity Test Agency	Angela Brown	08/27/2013

Public Alerts [Add Alert](#)

Title	Staff	Expires
No records to display...		

Household Members [Manage](#)

Michael Greensmith	Son	Edit
Amanda Greensmith	Daughter	Edit
Bobby Greensmith	Uncle	Edit
Melinda Greensmith	Wife	Edit
Bill Dunn	Grandchild	Edit
Bill Bender	Significant Other	Edit
Mike Dean	Uncle	Edit

Active Services

Case Management: Case Management	Edit
[BALT] Rental Assistance: Rental...	View

Selecting the 'Private' checkbox will make the Public Alert visible to only staff members in your agency. Not selecting it will make the Public Alert visible to all agencies.

Alex Greensmith Amanda Biel, Clarity Test Agency [Switch]
Reports | Calendar | Info | Logout

Profile History Services Programs Assessments **Notes** Files Location Referrals Attendance Search

Public Alerts

Title: Client has Medical Condition
 Agency: Clarity Test Agency
 Expiration Date: 03/31/2016

Note:

- Client has diabetes and does not take insulin treatment on a regular basis.
- Call for medical assistance if you observe any of the following:
 - Deep, rapid breathing
 - Flushed face
 - Fruity breath odor
 - Nausea or vomiting, inability to keep down fluids

Private

Add record or Cancel

CLARITY HUMAN SERVICES

After selecting 'Add Record', you can verify that the Public Alert is visible on the client's Profile page.

Alex Greensmith Amanda Biel, Clarity Test Agency [Switch]
Reports | Calendar | Info | Logout

Profile History Services Programs Assessments Notes Files Location Referrals Attendance Search

Client Profile Denver Charles Profile Screen

Public Alert: This client has been issued system-wide alert. Please review notes for full details. --

Social Security Number: 848 - 46 - 3892
 Quality of SSN: Full SSN Reported
 Last Name: Greensmith
 First Name: Alex
 Date of Birth: 02/25/1971 Adult Age: 42
 Quality of DOB: Full DOB Reported
 Unique Identifier: 1F71F04B1

Update photo

Household Members Manage

Michael Greensmith	Son	Edit
Amanda Greensmith	Daughter	Edit
Bobby Greensmith	Uncle	Edit
Melinda Greensmith	Wife	Edit
Bill Dunn	Grandchild	Edit
Bill Bender	Significant Other	Edit
Mike Dean	Uncle	Edit

Active Services

HOW DO I ADD A STATUS UPDATE OR CONDUCT AN ASSESSMENT

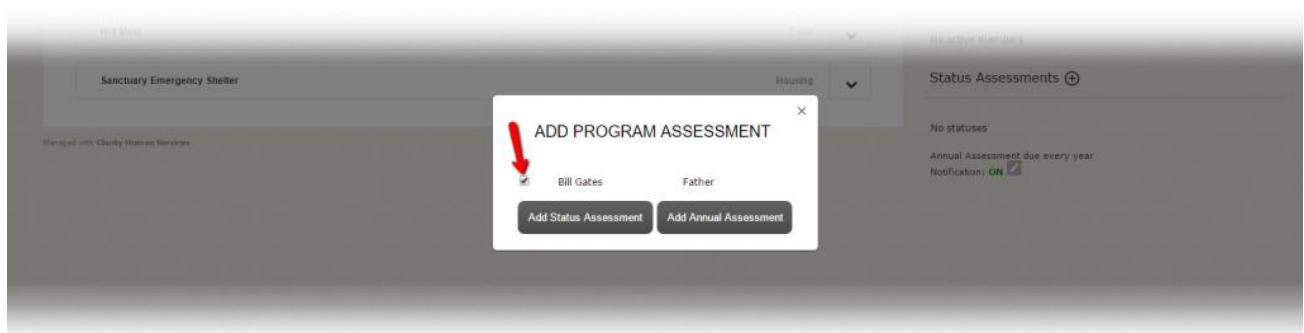
Adding a program-based status update (ex: Annual reviews & General updates)

A client's disability, income or benefits may change while enrolled in your program. These changes should be recorded in HMIS in order to accurately track a client's ability to be more self-sufficient.

To add a status assessment

1. Click the **Programs** tab in the client profile
2. **Mouseover** the program name
3. Select the **“Edit”** link that appears to the left.
4. Select **Assessments tab** under program name
5. On the right side of the screen, click on the **ADD +** link next to the Status Assessments.
6. Select the **clients and family members** you want to conduct the status assessment.

This will allow you to conduct the status assessment for all selected group members in sequence, without having to go into each client record separately.



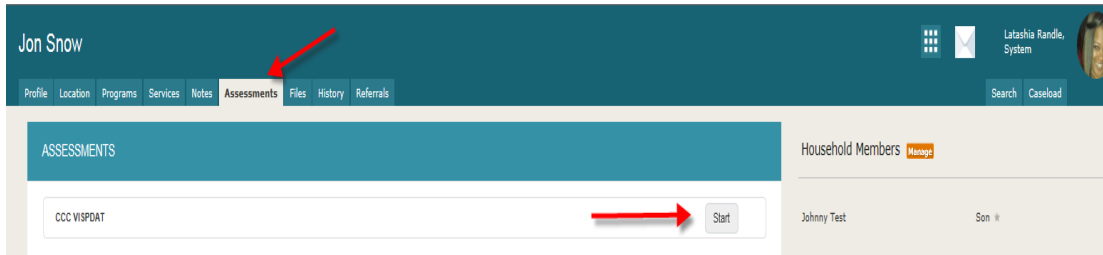
1. Click **“ADD STATUS ASSESSMENT or ADD ANNUAL ASSESMENT”** to access the assessment.
2. Click **“Save & Close”** (or **“Save & Next”**, if you are also doing the assessment for other family members) after you have completed the assessment.

Note: Some of the fields in the assessment may already be completed. Data carries over from either the enrollment screen or the most recent assessment.

How do I conduct a Non-Program based-assessment (VISPDAT etc..)?

1. Click on **Assessment tab** of client profile
2. Find the assessment Ex: VISPDAT
3. Click on **Start button** to the right

4. **Complete** the Intake Information
5. Click **SAVE**



PROGRAM EXITS

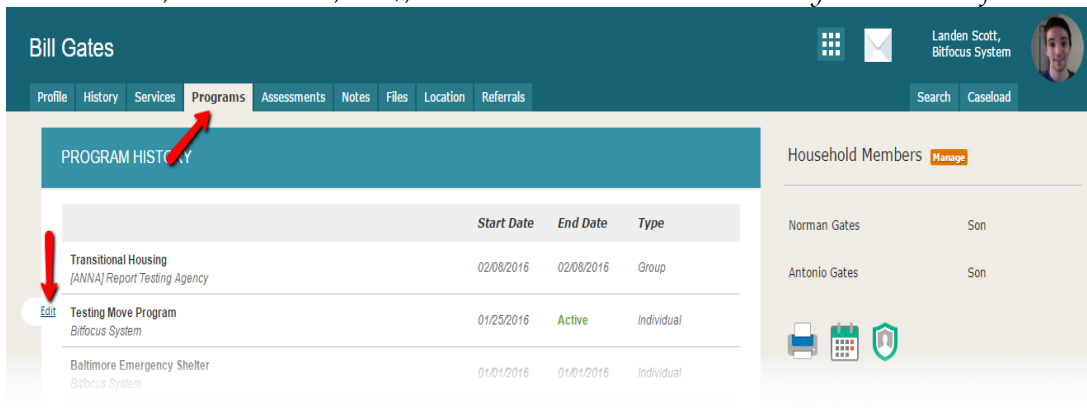
Exit a client from a program.

This section discusses how to exit a client and household members from a program.

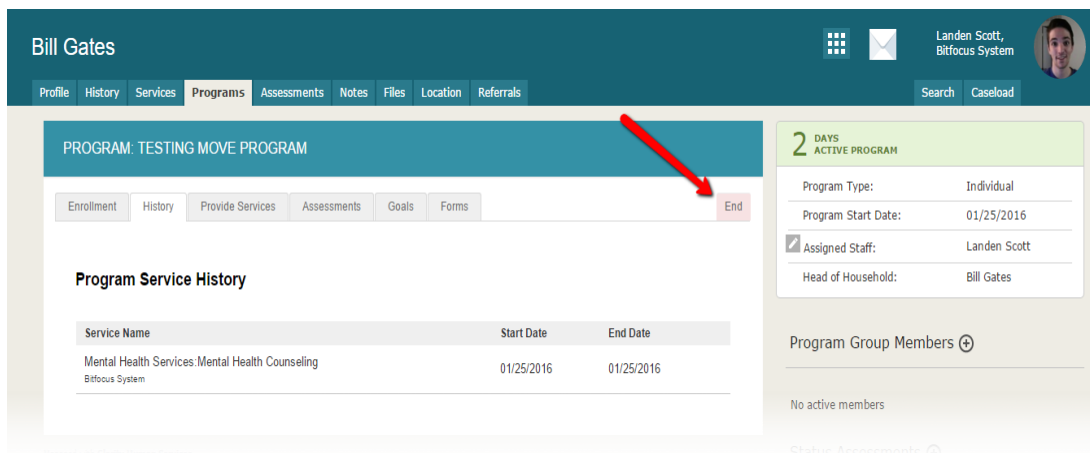
1. Go to the **Programs** tab from the client's record.
2. **Mouseover** the program name
3. Select the **"Edit"** link that appears to the left.

Auto Exit Feature: Optional this feature is only enabled for certain programs.

NOTE: If a client has no program activity for a prescribed period of time (e.g. no service transactions, assessments, etc.), this client will be automatically disenrolled from the program.

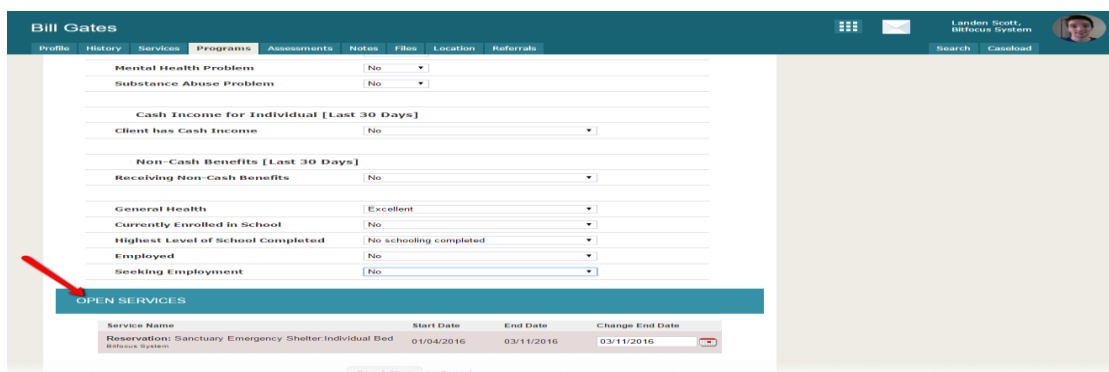


4. Select the **"End"** tab:



If the client is scheduled for services that will occur after the program exit date, then these services will appear where you can conveniently close them.

Note: that this functionality is only available if the System Administrator has enabled the feature. Please confirm with your supervisor.

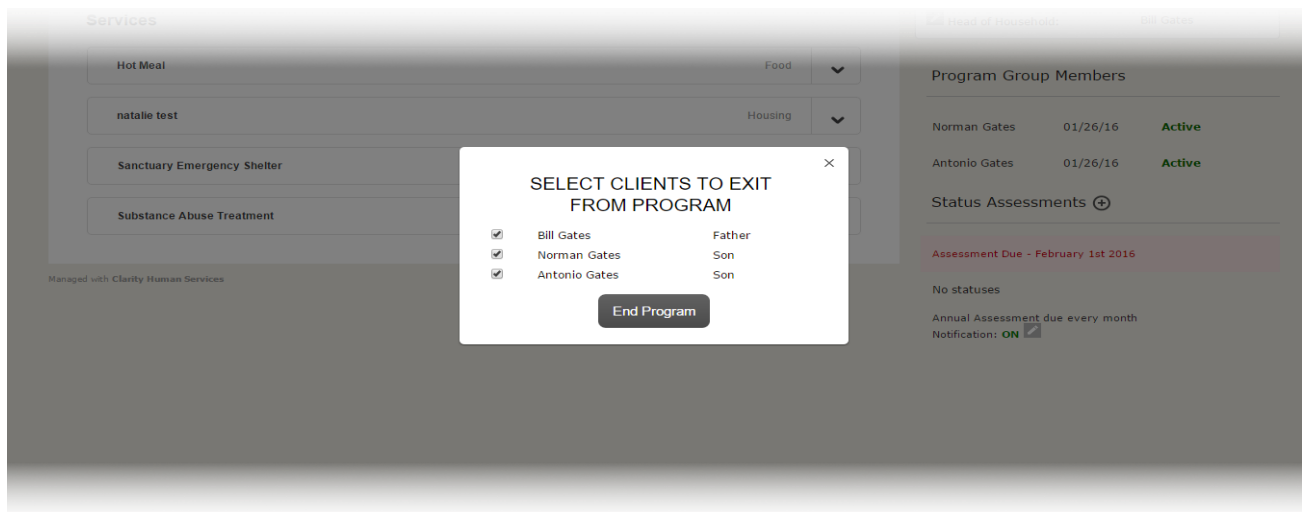


7. Complete the program exit screen and, if appropriate.
8. **Close** any open services.
9. Select **“Save and Close”**.

Exiting a Household

When exiting a household, the option to exit several household members will appear.

1. Simply check the **box next to the member(s)** you wish to exit.
2. Exit screens will appear in sequential order for each household member.



Note: Exit family members you have to go into each individual person to answer the exit questions. End the main member, fill out their exit screen, and then click on the family members name on the right side of the screen.

CLARITY GLOSSARY

This table provides definitions for the system functionality.

History	A comprehensive list of all program and service transactions, including, but not limited to: details of expense transactions, assessments, referrals, programs (active and inactive), and services.
Services	A comprehensive list of services and service/expense transactions with options to delete or modify services, and conduct, modify, or delete service/expense transactions.
Programs	Comprehensive list of Programs (active and inactive) with the options to enroll/end programs, as well as modify or delete any programs or program details.
Public Alerts & Client Notes	Includes all notes and public alerts with options to view, create, modify, and delete notes and public alerts.
Files	Includes all files in client record with the option to view forms, add forms, edit and delete forms.
Attendance	Capability to manage all aspects of Attendance, including the ability to upload scanned unique identifier CSV files.
Manage Agency	Capability to manage all aspects of the system at the agency-level, including the ability to save changes to all tabs in the Manage section: Agency Overview tab, Services tab, Funding tab, Programs tab, Employers tab, Assessment tab, Site tab.
Report Library	Capability to run and schedule all reports in the Report Library.
Household Management	Capability to carry out all aspects of household management.
Location	Capability to view, add, edit, or delete location information, including current and past addresses.
Analysis	Capability to carry out all aspects of report analysis in the Analysis tab of the Report Library.
Assessments	Capability to view assessments (including ineligible assessments), conduct assessments, edit/delete assessments, as well as print directions and checklists.
Referrals	Capability to search for and view past and pending referrals, as well as conduct referrals.
Agency-Sensitive Data	Access to Agency-sensitive data.
Client Reports	Access to client reports.
Caseload	Ability to manage all caseload tasks from the Caseload tab.
Standalone Attendance Module	This access only allows the user to view/edit the attendance tool. Users with this access cannot access the search screen for client files or reports. It is primarily designed for volunteers.
Referral Matchmaker	Ability to refer clients to agencies other than their own.

Notes

