HOMELESS MANAGEMENT INFORMATION SYSTEM

Contra Costa County

January 15, 2019

CLARITY HMIS Workflow

End User Training

Contra Costa County
Health Housing & Homeless Services
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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

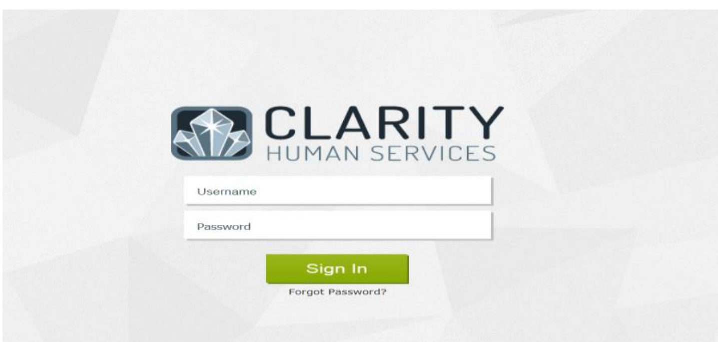
Clarity User Home Screen

Logging In

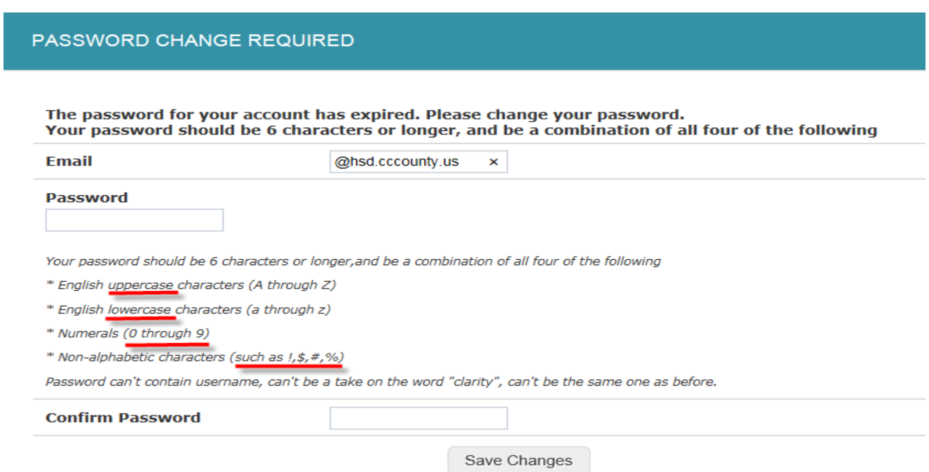
To perform tasks in Clarity, you need to log into the system. Every user at your organization will have a unique login and password.

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 @hsd.cccounty.us ×

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.

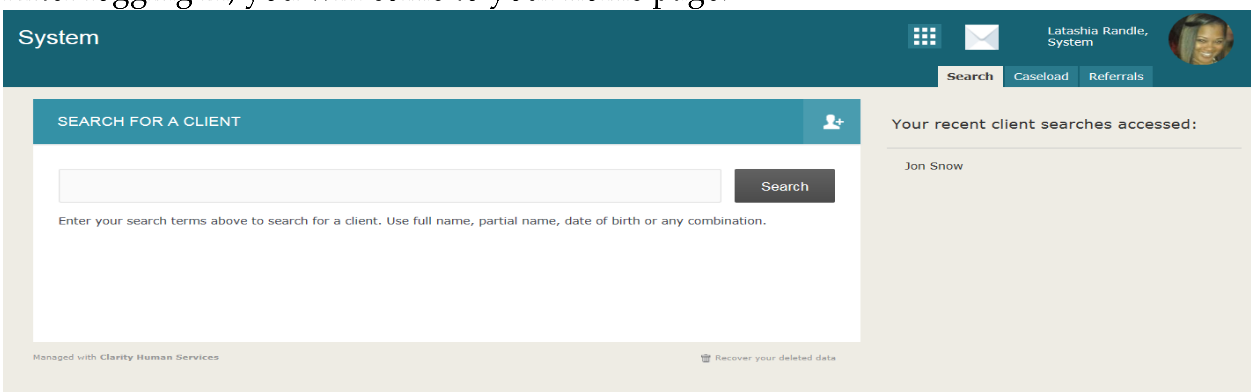
Confirm Password

Save Changes

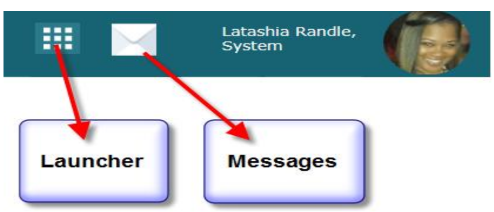
1. Enter **New Password**
2. Confirm Password: Enter **Same Password** again
3. Click **Save Changes**

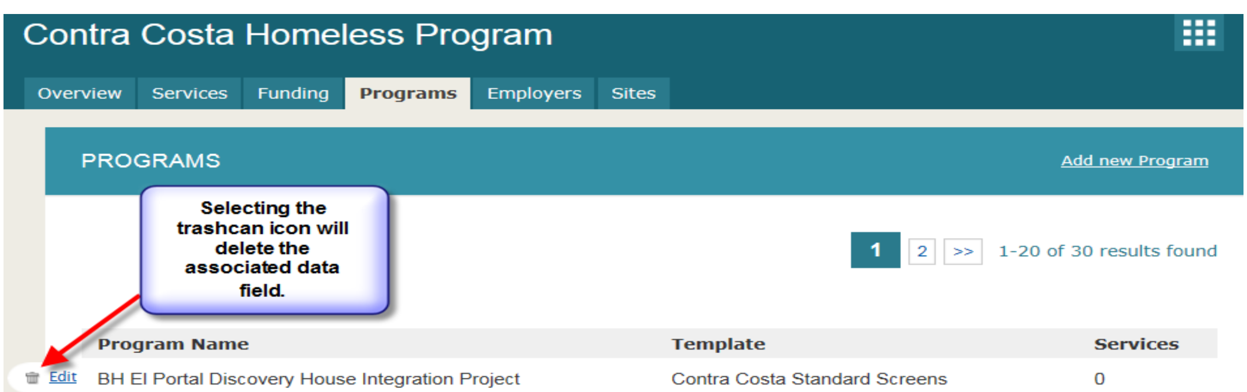
Navigating

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



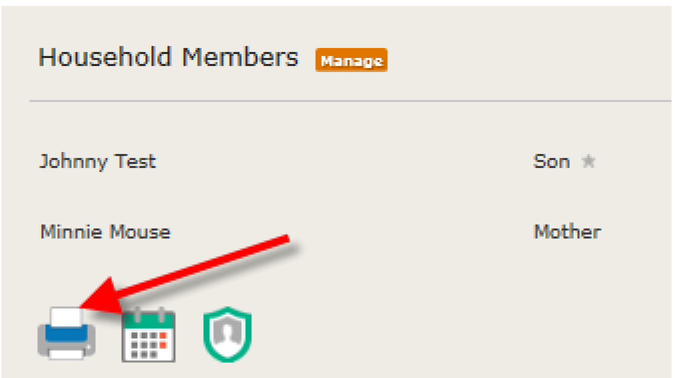
Understanding the Icons





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.

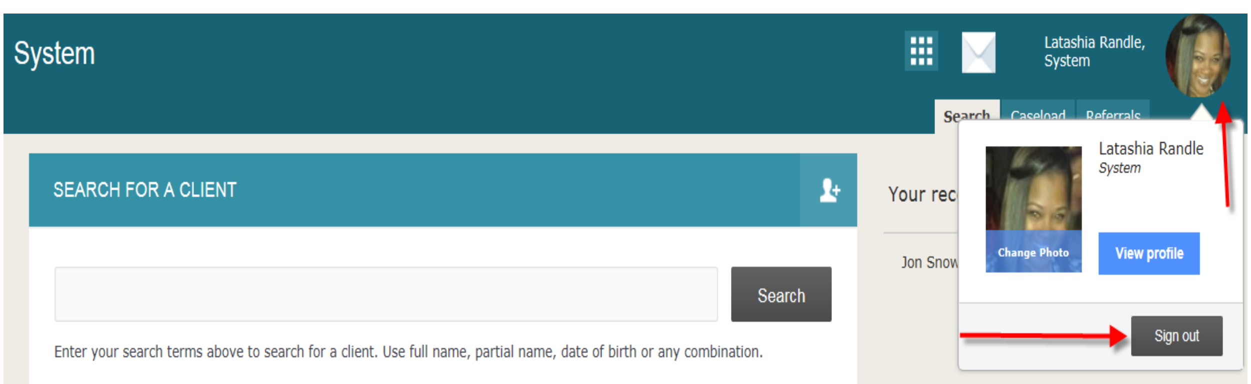
Client Reports Icon - On the right side of the screen where end-users can print the following information: Client History, Photo ID Card, Profile Screen, Case Notes, Client Appointments, and Client Summary & Client Service Notes.



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**.

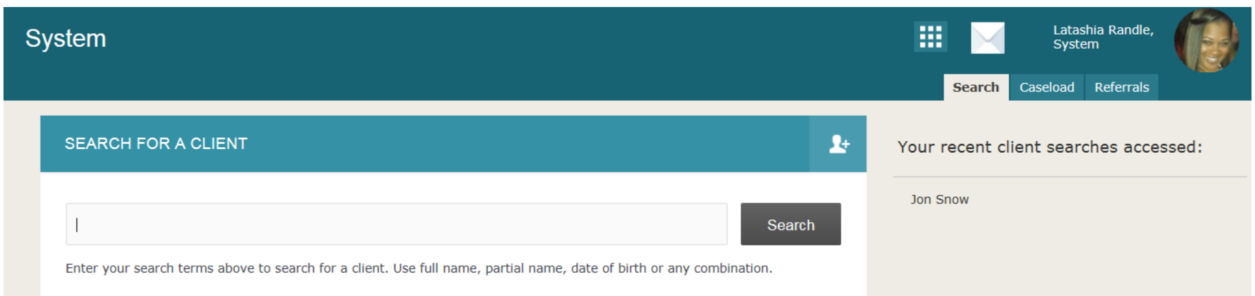


New Client

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.



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.

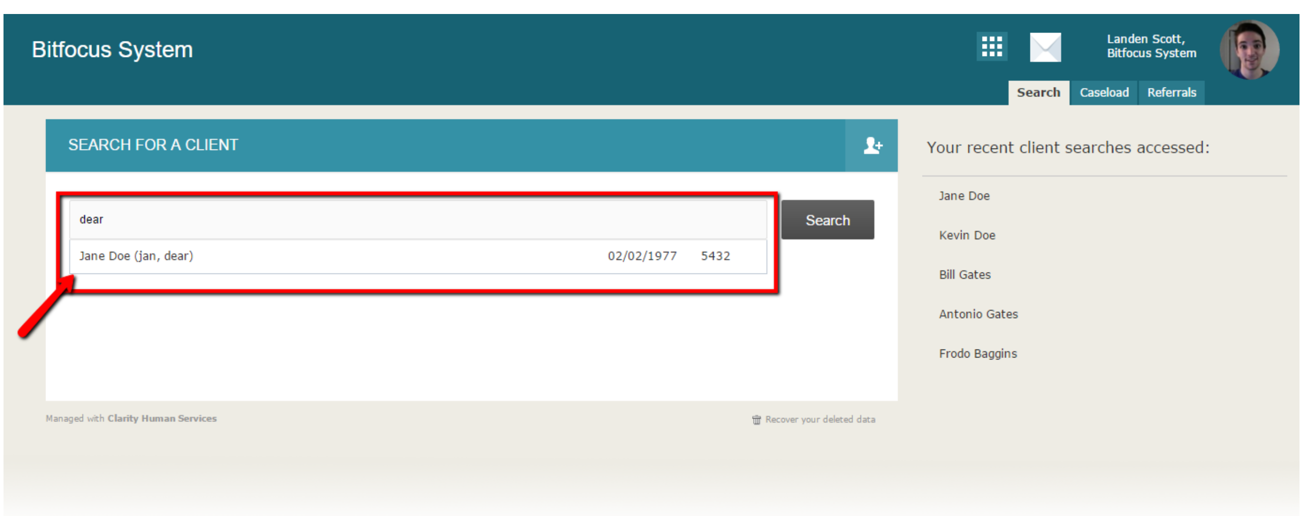
For example: If you are searching for Betty Robinson, entering a "**Bett**" in the search field makes it much easier to find the correct client.

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.

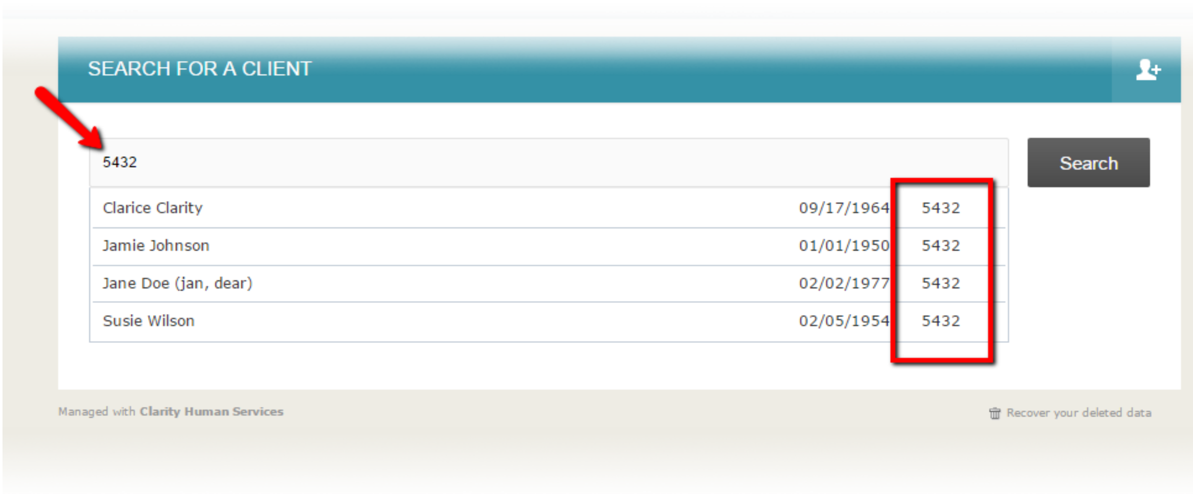


This feature is available from:

- 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.

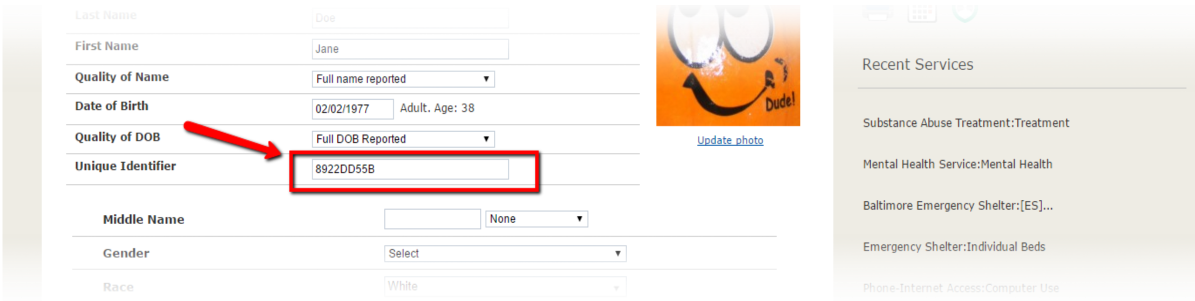


Search by Date of Birth

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

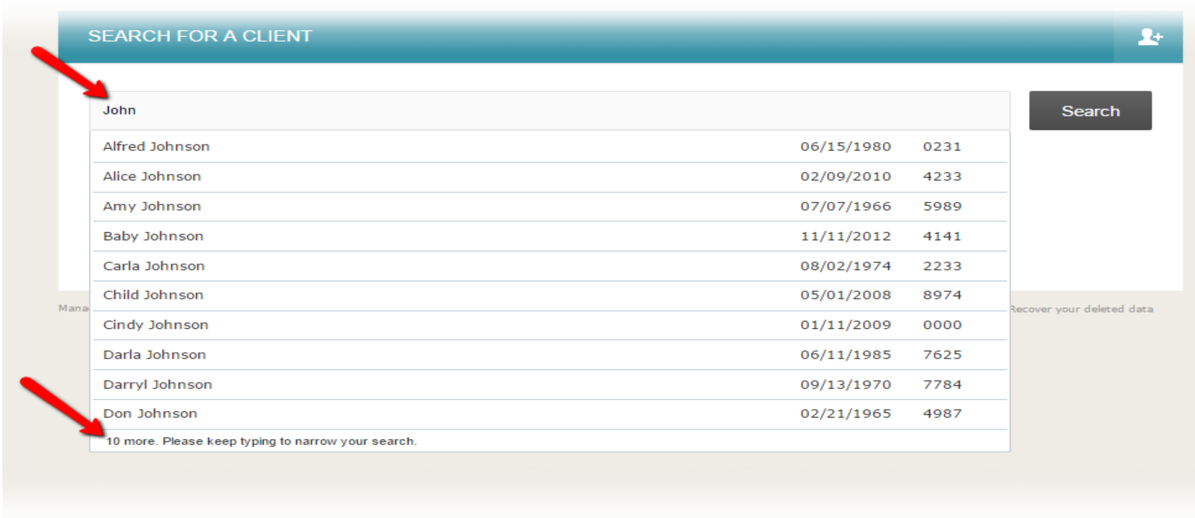
Search by Unique Identifier

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.

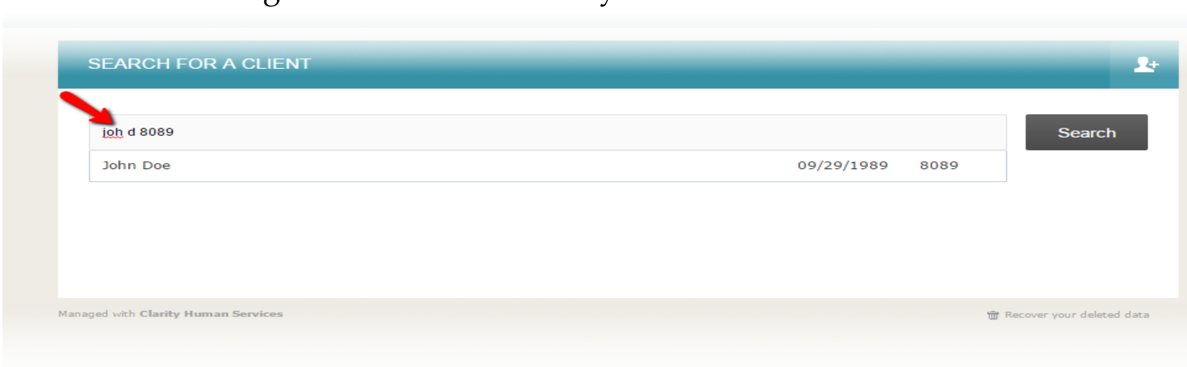


Refining Your Search

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

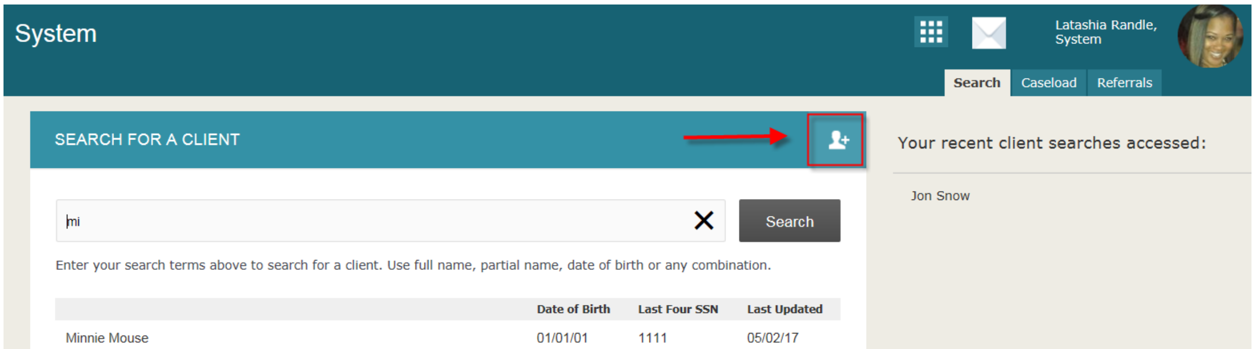


When a large result set is listed, you can further refine your search by combining your search terms until the result is shorter, or you find your given client. For example, a search term of "John W 7403" will search for a combination of a partial First Name, Last Name, and the last four digits of the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



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.

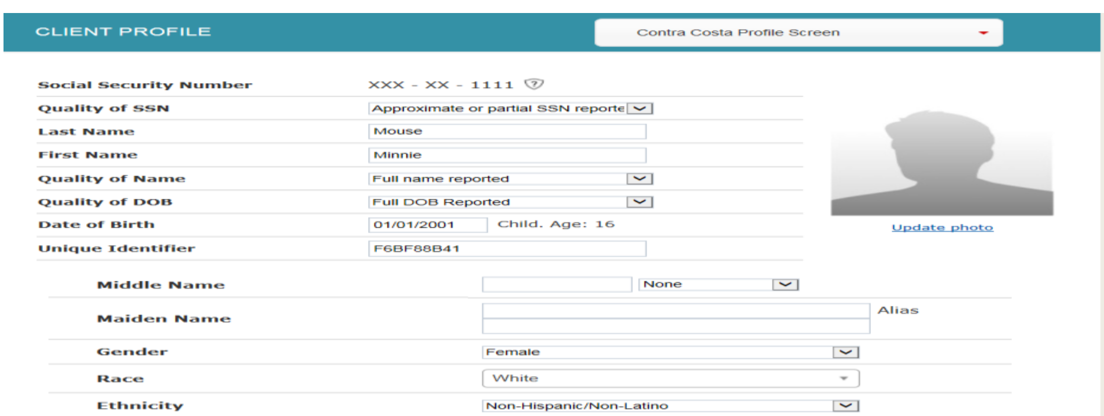


You will be taken to the Client Profile creation page. This page will present the questions necessary to create a basic client account. Complete all necessary fields to create your client.

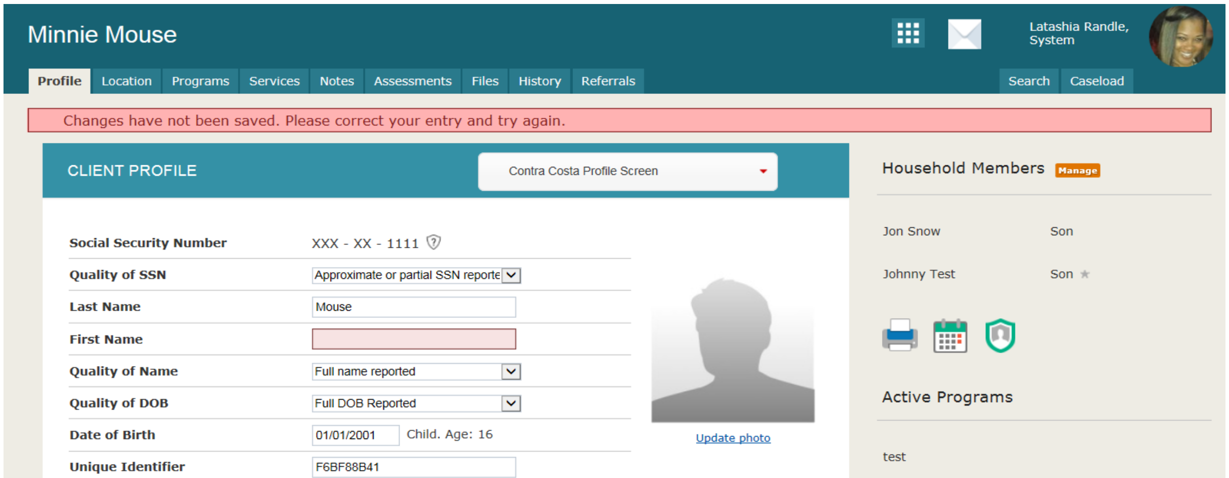
1. Click on The **New Client Icon**
2. Complete **CREATE A NEW CLIENT** Form
3. Click **ADD RECORD**

Core Data Fields

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



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.



Required vs. Soft Required vs. Not Required Fields

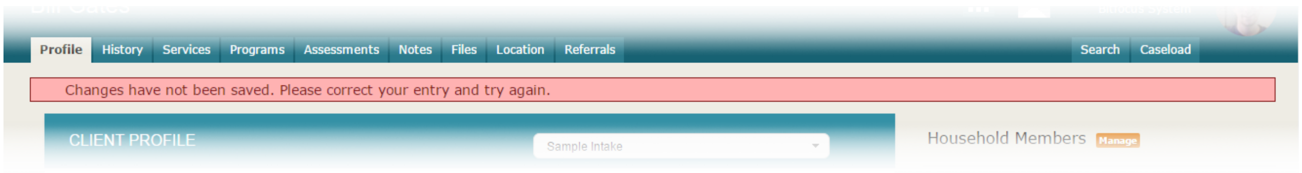
The dynamic intake forms powered by Clarity provide many flexible features. Individual data elements can be Required, Soft Required or Not Required.

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…

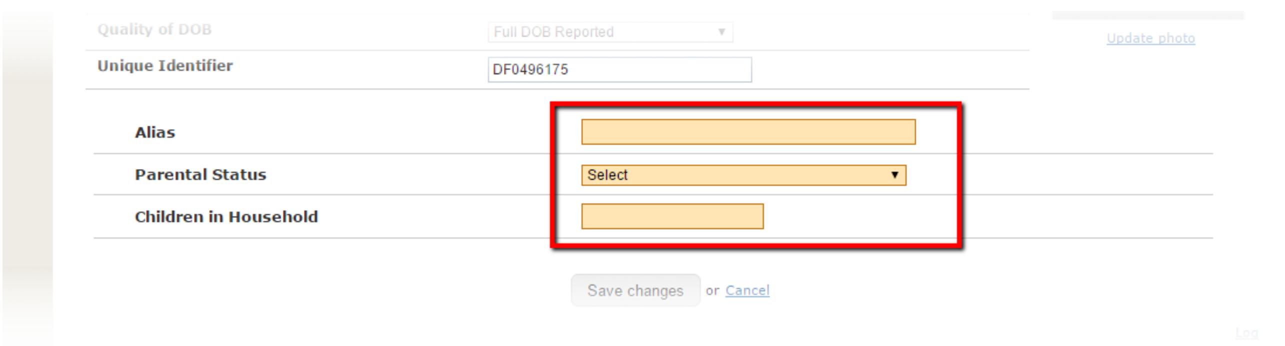
…a red warning bar displayed at the top of the screen when the screen is saved.…



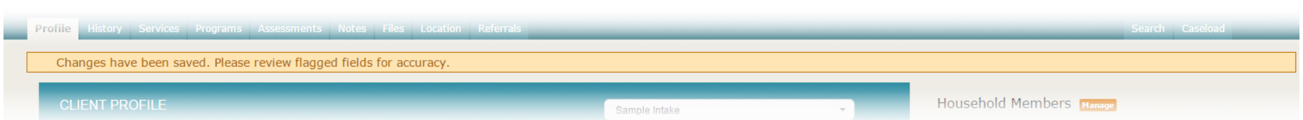
Soft Required Fields

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.

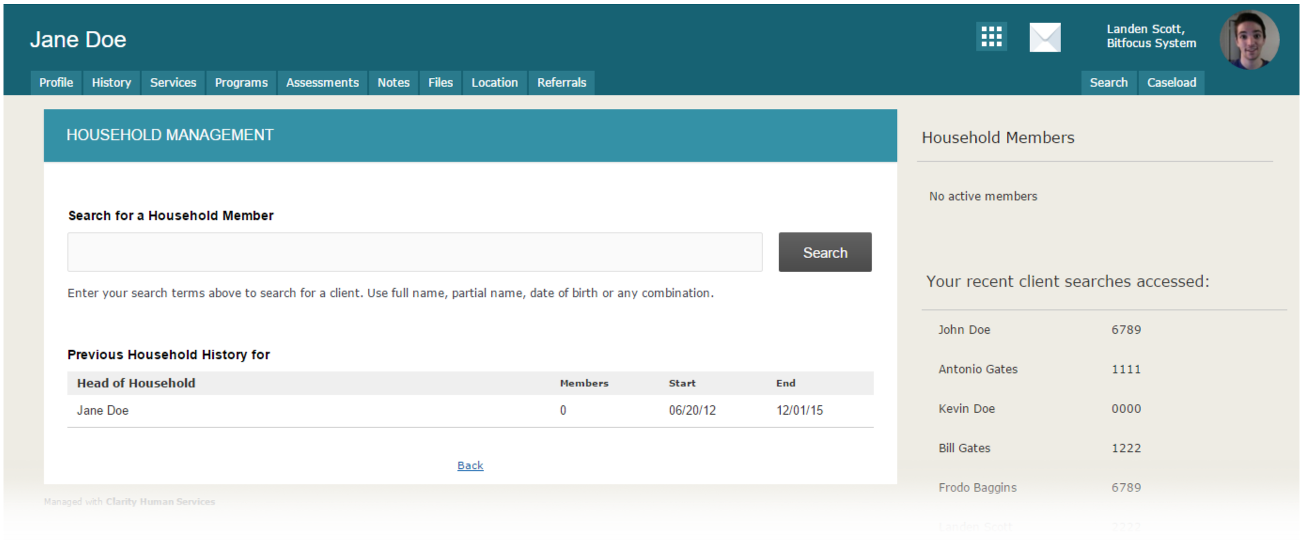
These methods are:

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

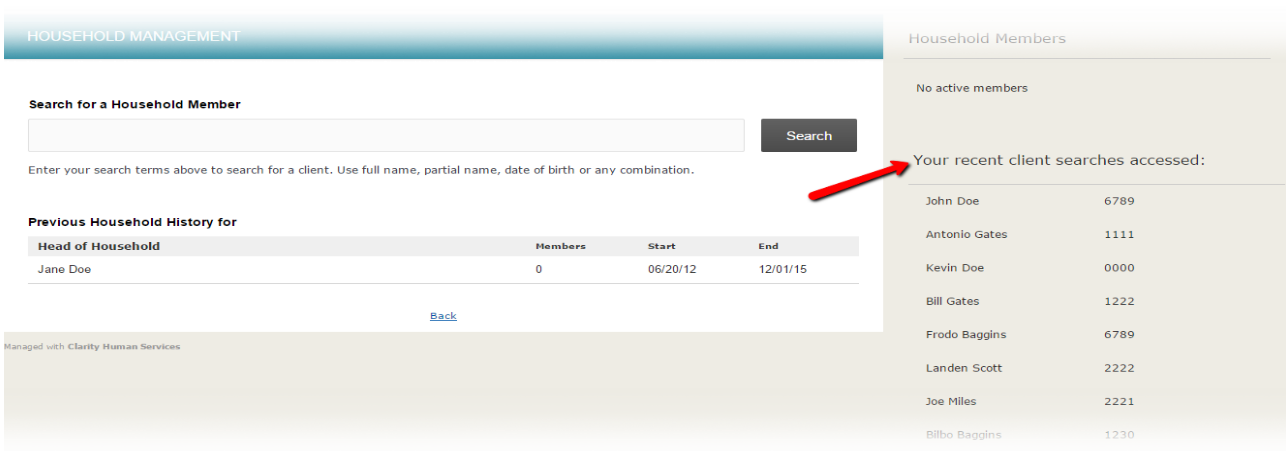
Quick Add/Join Functionality from the Side Bar

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

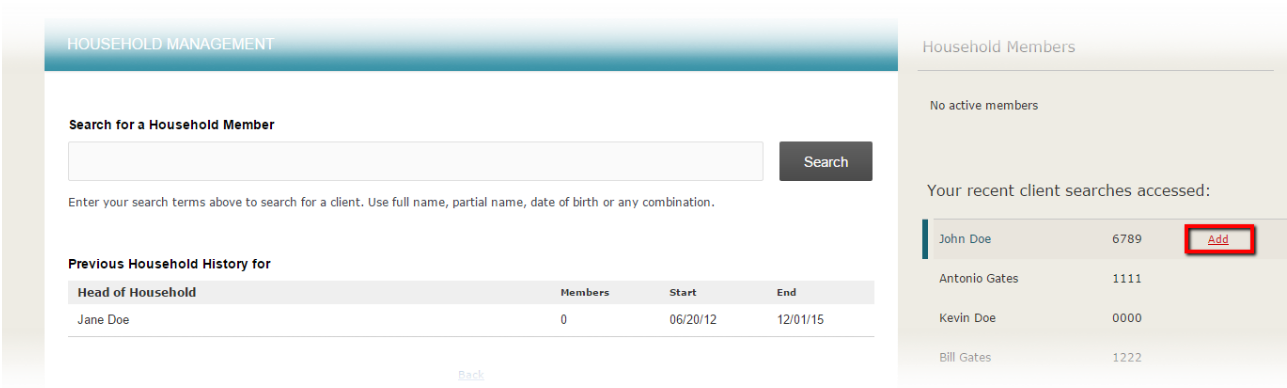
This will take you to the Family/Household Management search screen.



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.

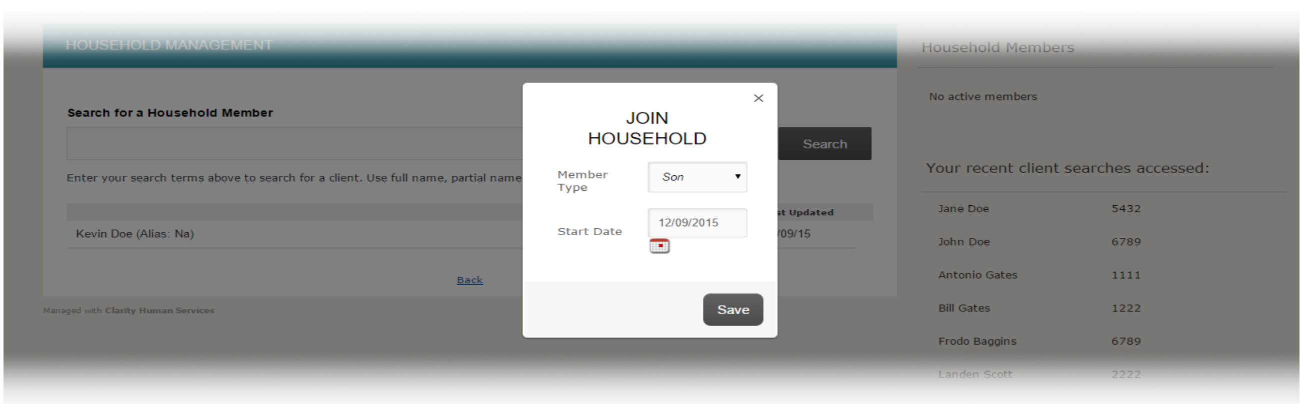


Clients that currently are not members of any Family/Household will be listed with the “Add” option when you hover over their name.



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

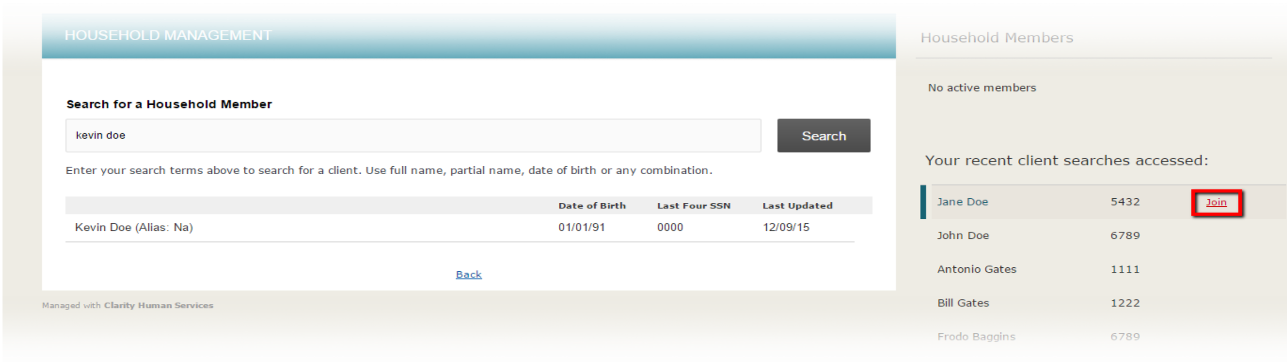
1. Selecting "**Add**" will display a window
2. Enter **Member Type**
3. Enter **Start Date**.
4. Click **Save**



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

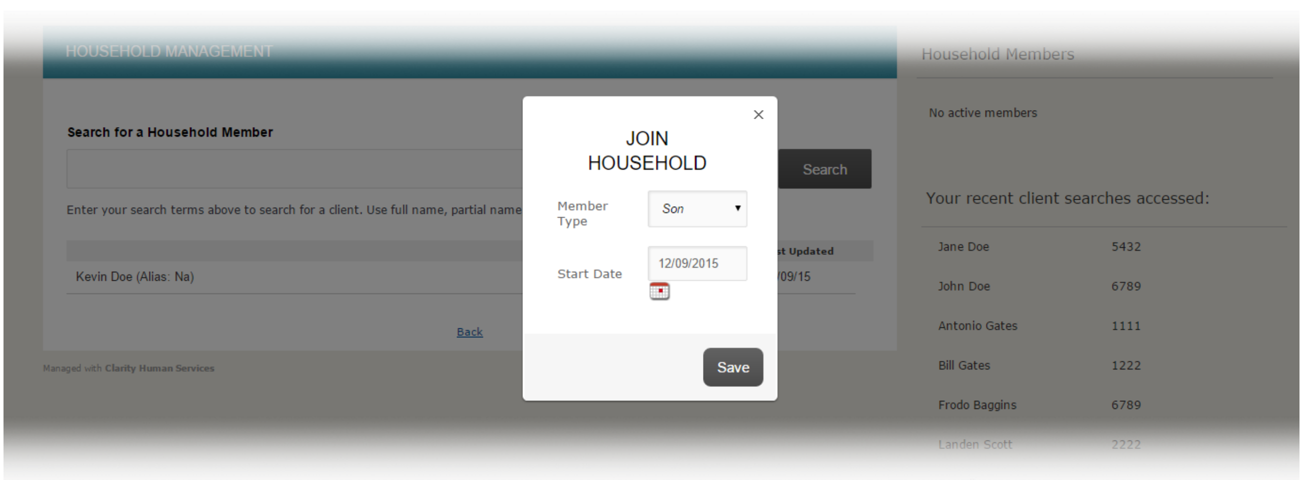
Join

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.



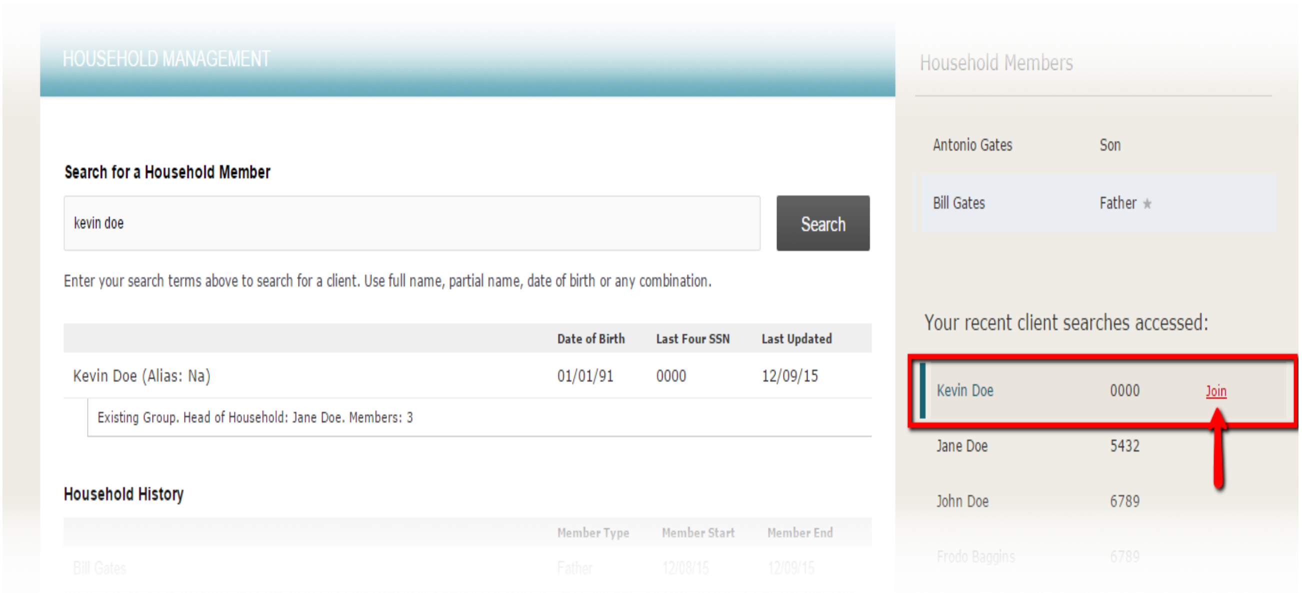
The Join option allows for two unique functions based on the Family/Household status of the current client:

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

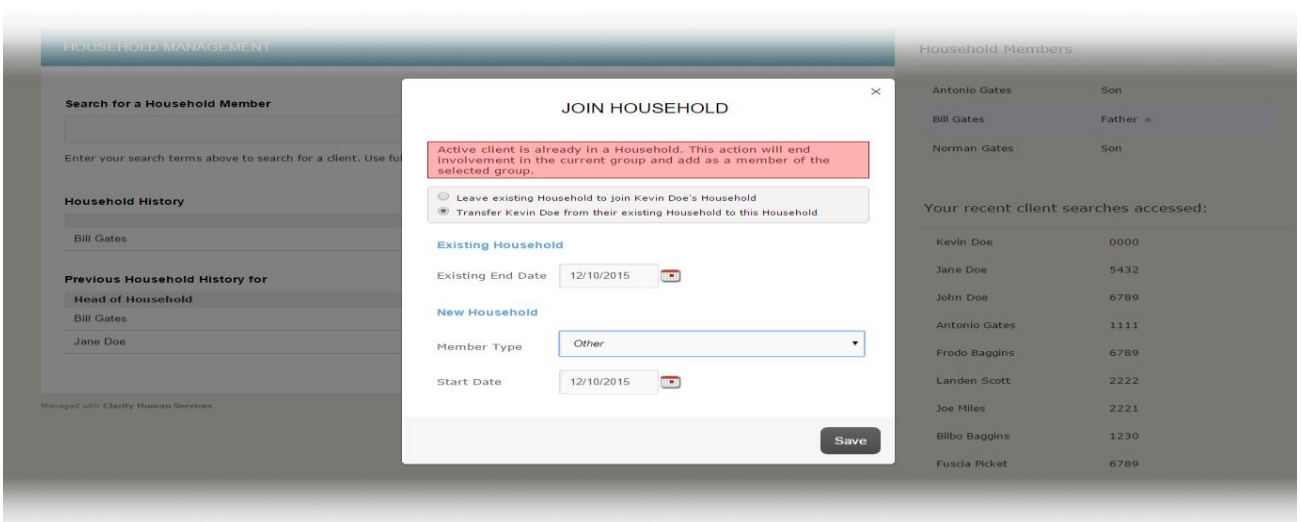


Scenario 2. Current client is already a member of a Family/Household: In this unique circumstance, Clarity allows you to make a decision.

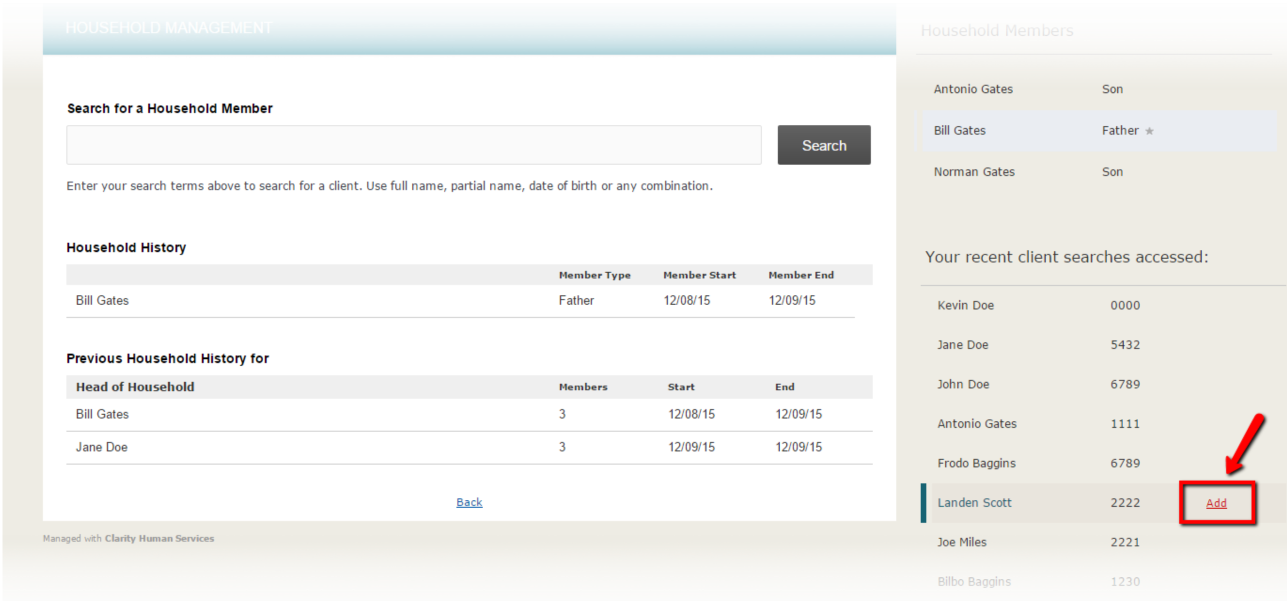
- a.) *Would you like to have your current client leave their existing Family/Household to join another Client's Family/Household?* If so, select 'Join'.



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

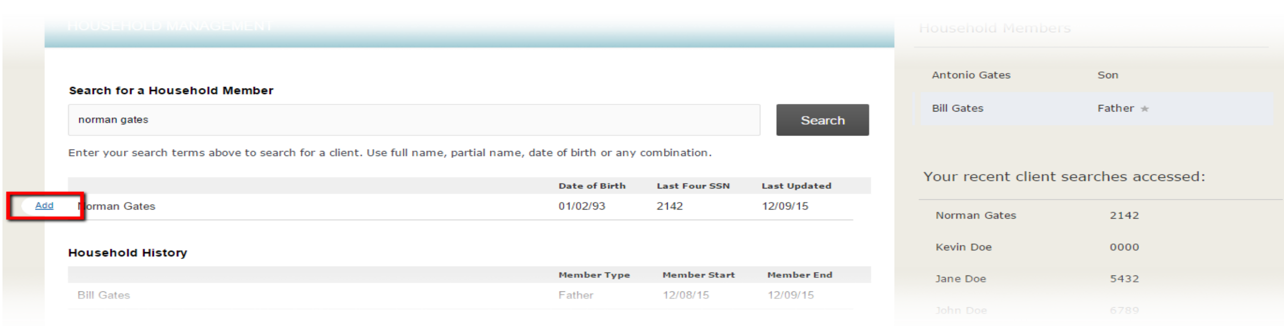


b.) *Would you like to transfer another client from their current Family/Household into your active client's Family/Household? If so, select '**Add**'.*



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.



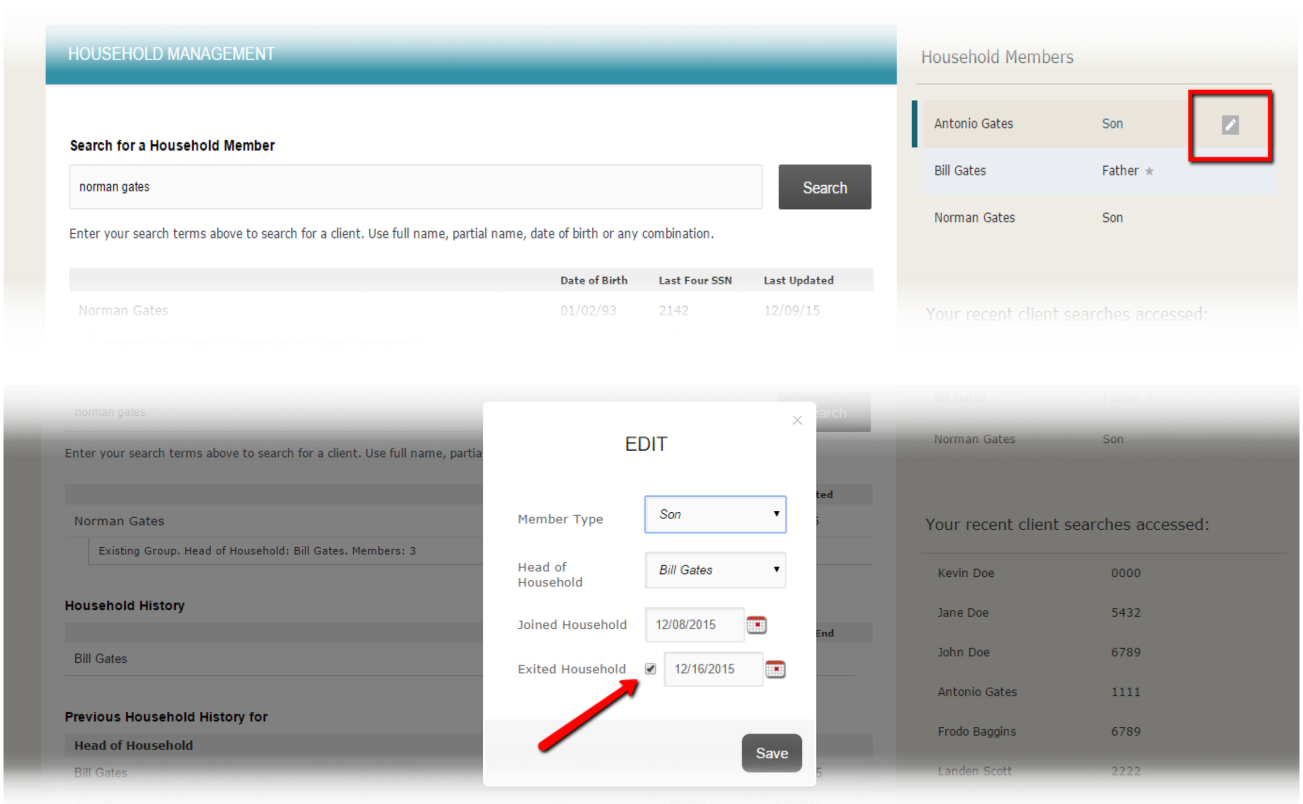
Ending a Client's Family/Household Membership

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.



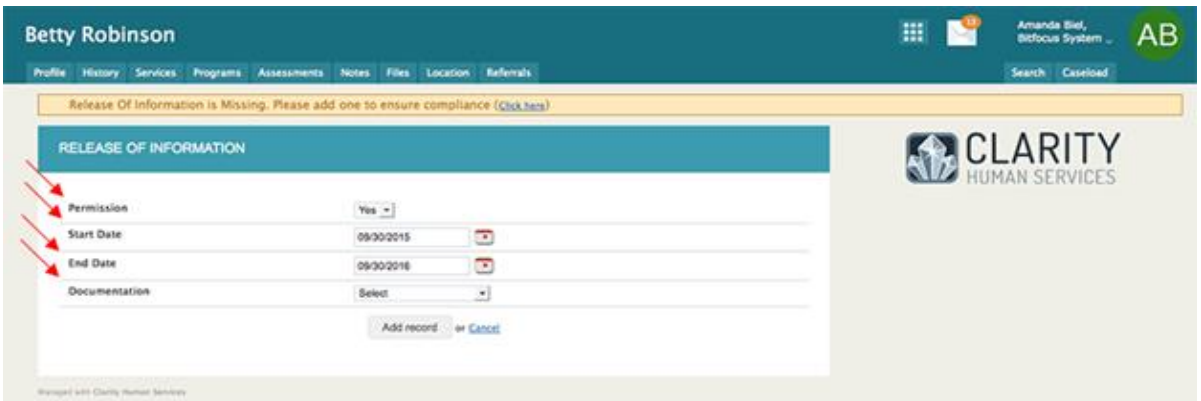
Release of Information

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 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.

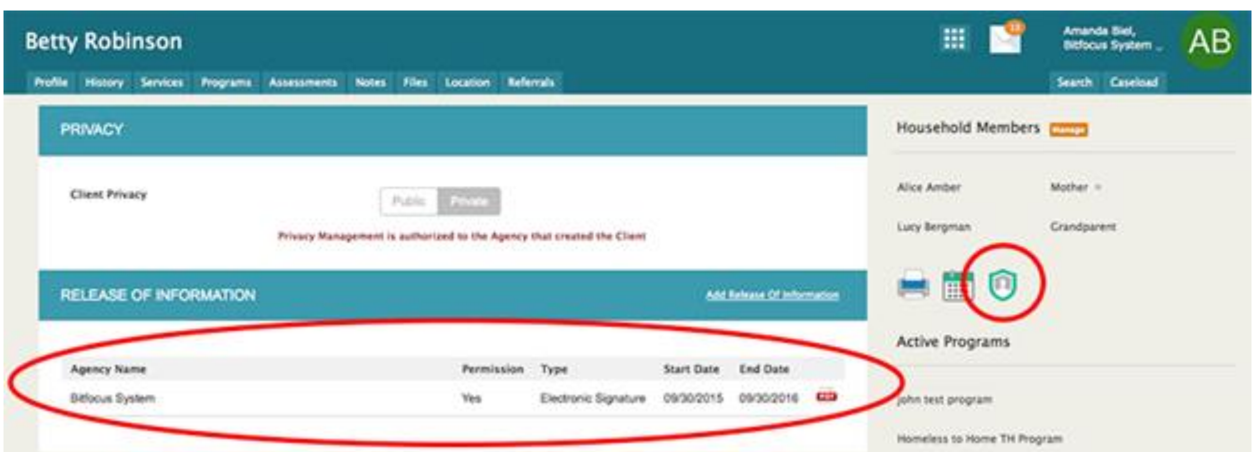
6. Enter **Documentation**

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.*



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.

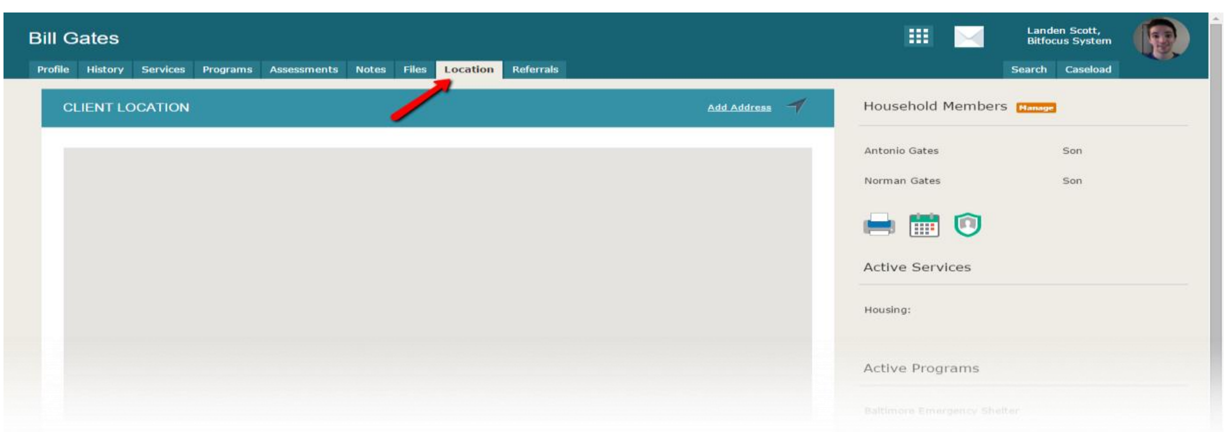
Enter the ROI information in the Release of Information box using the instructions listed in the Managing ROI forms within Existing Client Profiles section above.

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.

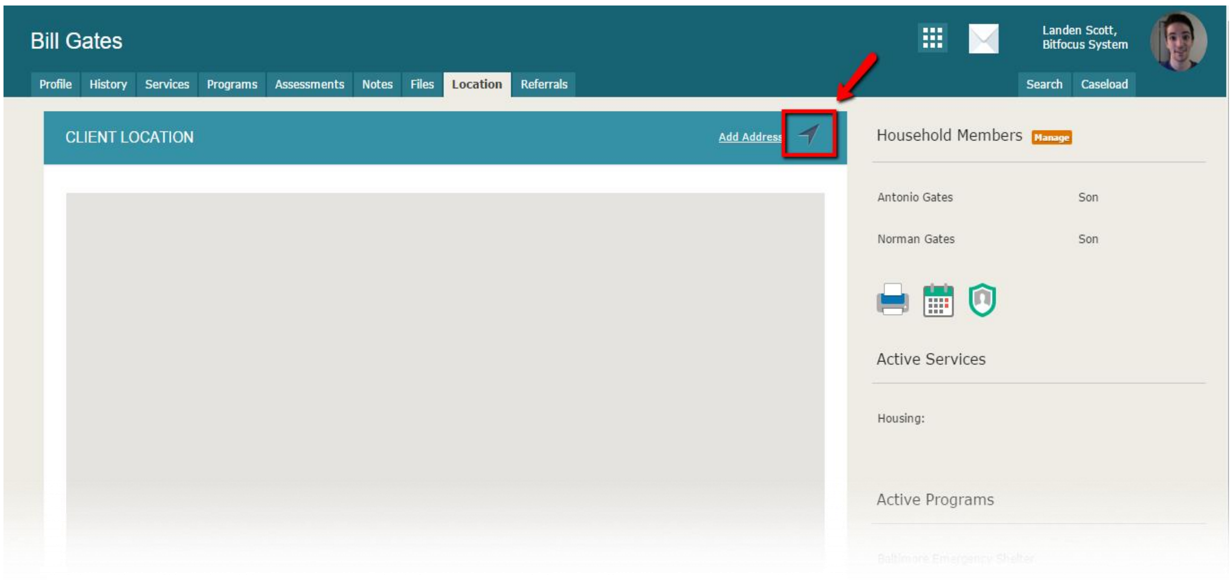


From here you can add a new address by two methods.

Method 1:

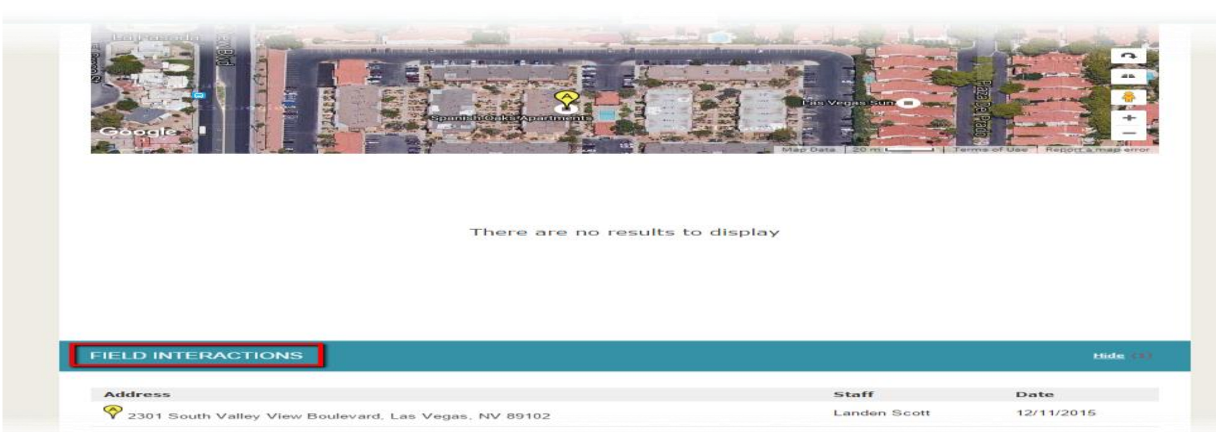
If your current location is the address you wish to enter.

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,

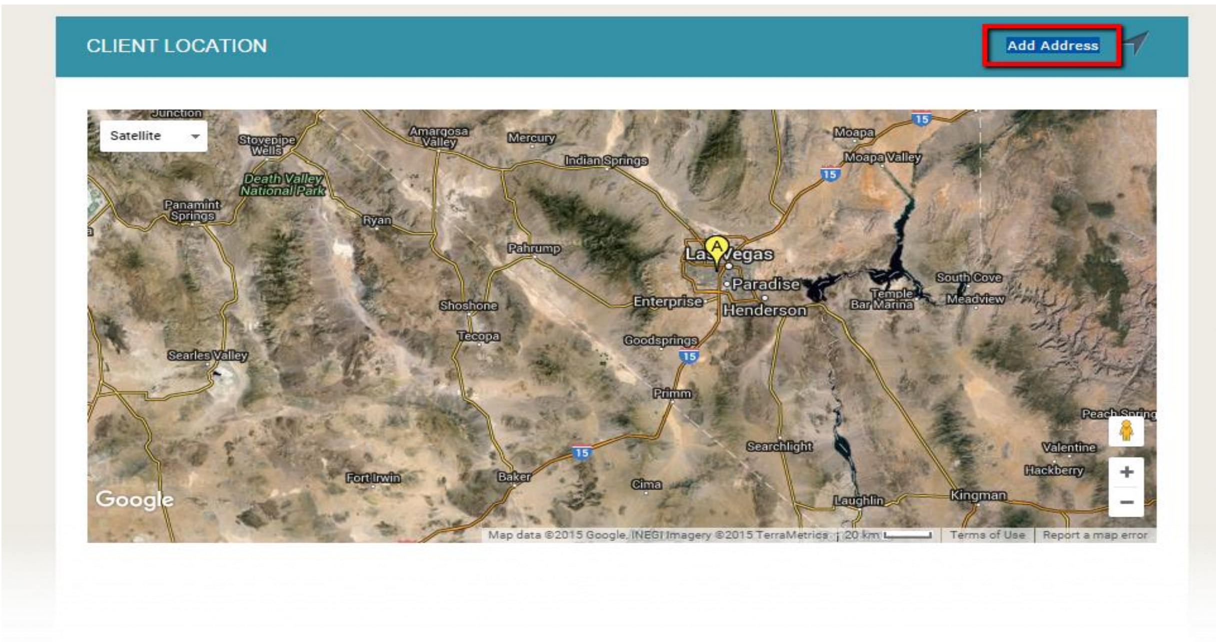
2. Auto-fill the address information by selecting the '**Field Interactions'** link.



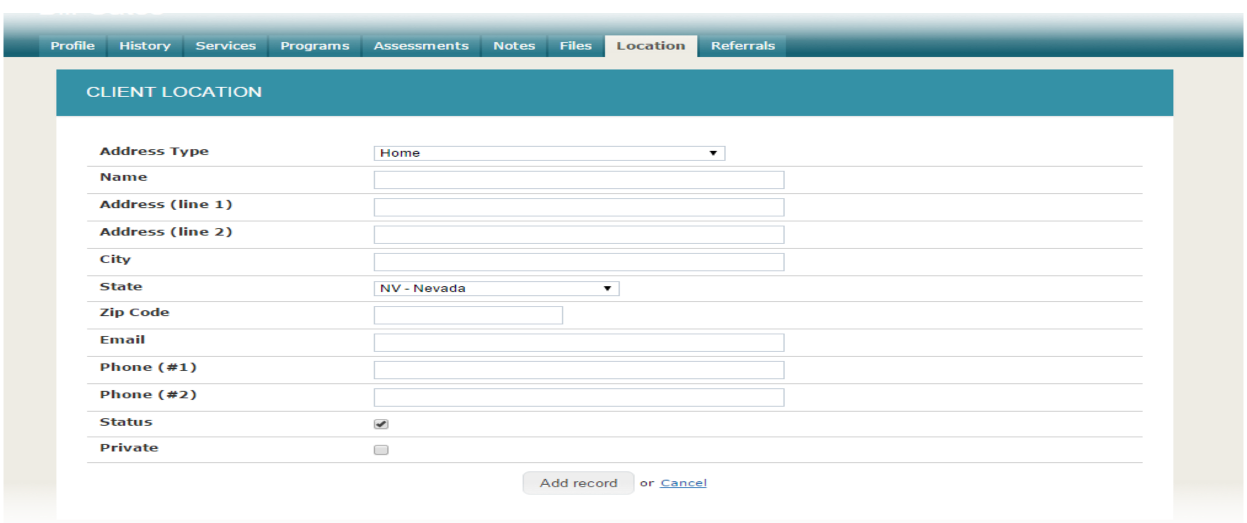
This feature is particularly helpful when you are in the field and need to enter your current location.

Method 2:

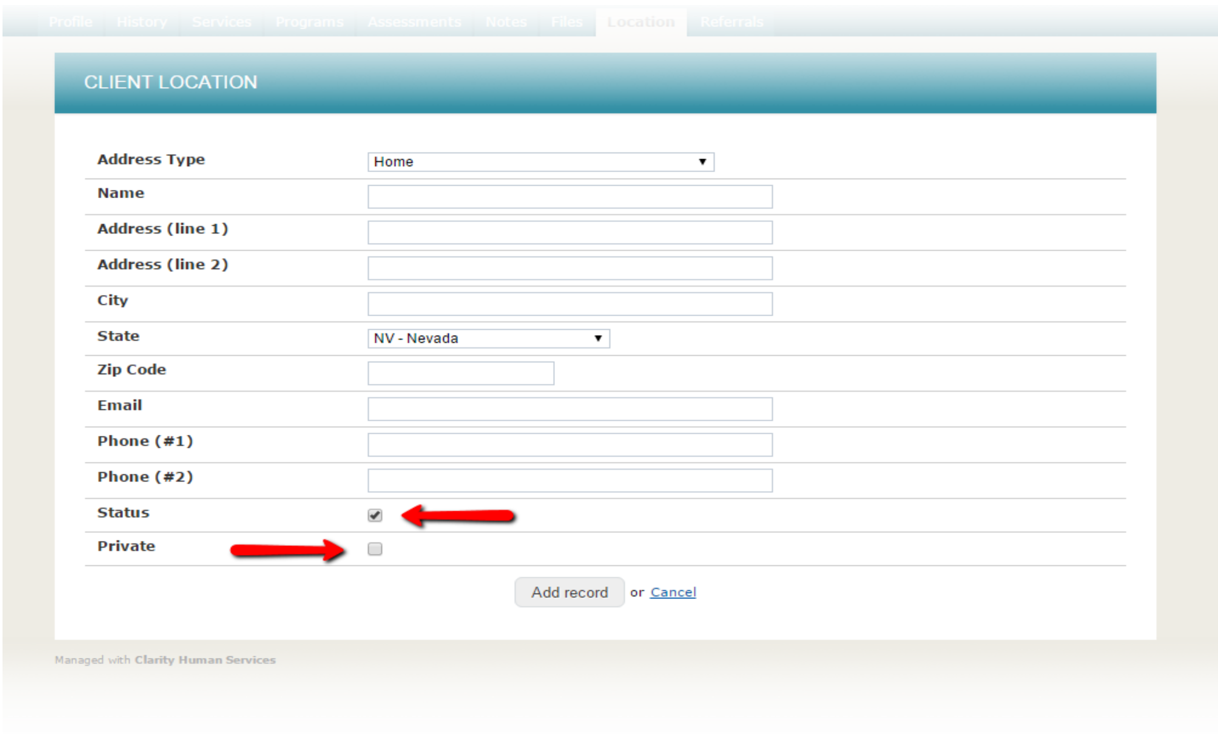
1. Click the **'Add Address'** link in the top right corner of the Location tab.



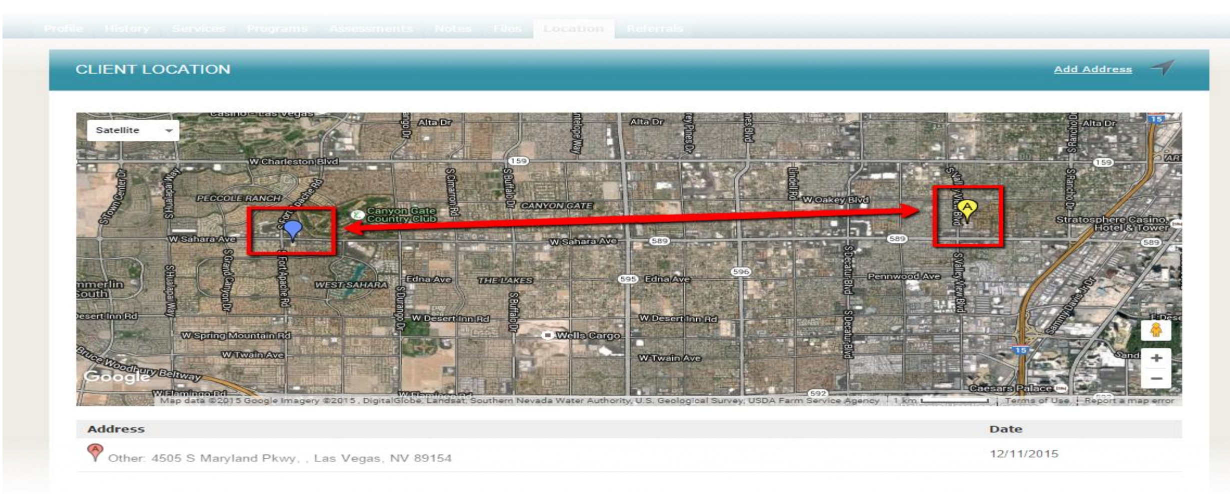
2. This will open the **Client Location** screen.
3. You can enter the **Address information**.



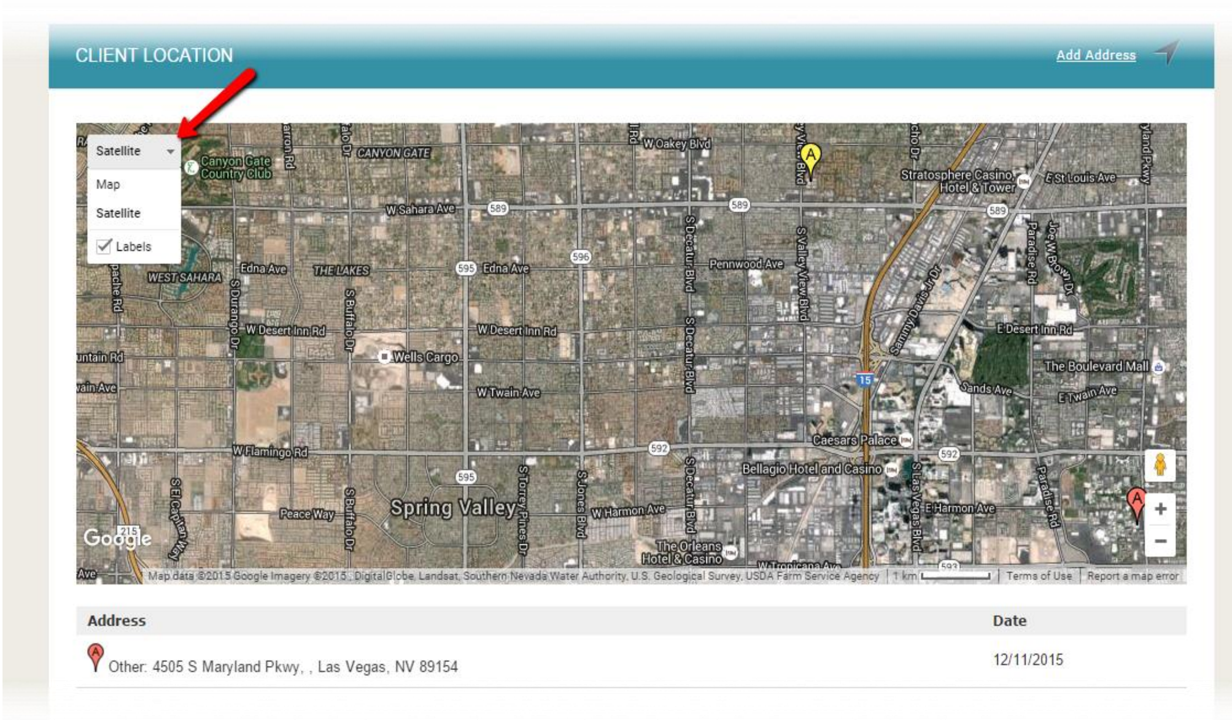
- **Status** – When checked, it is considered an Active address, otherwise it is Inactive
- **Private** – When checked, the record becomes Private and only your agency will have the ability to view the record. When unchecked, regular Sharing rules for your agency apply.



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

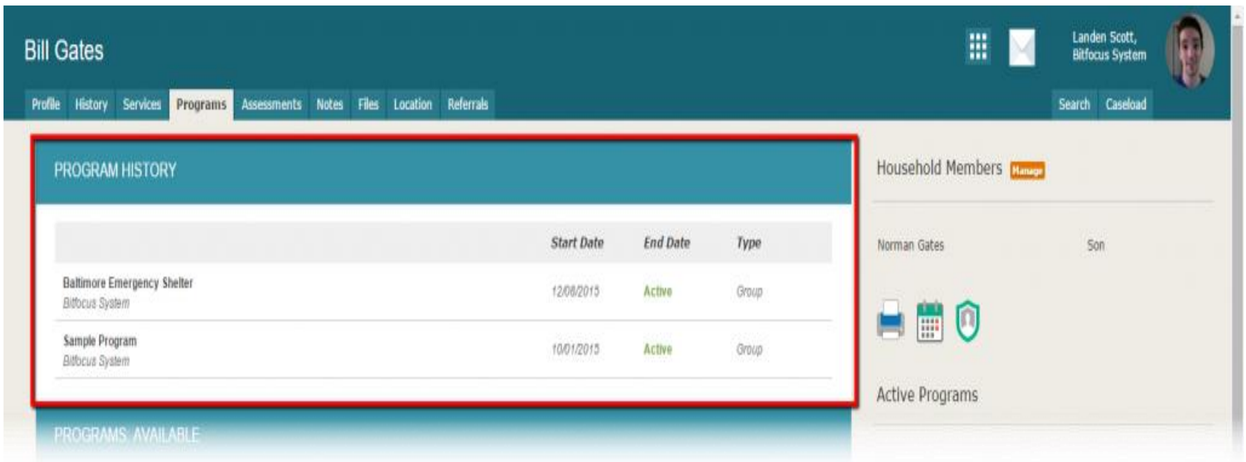
How to enroll a client into a Program

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.

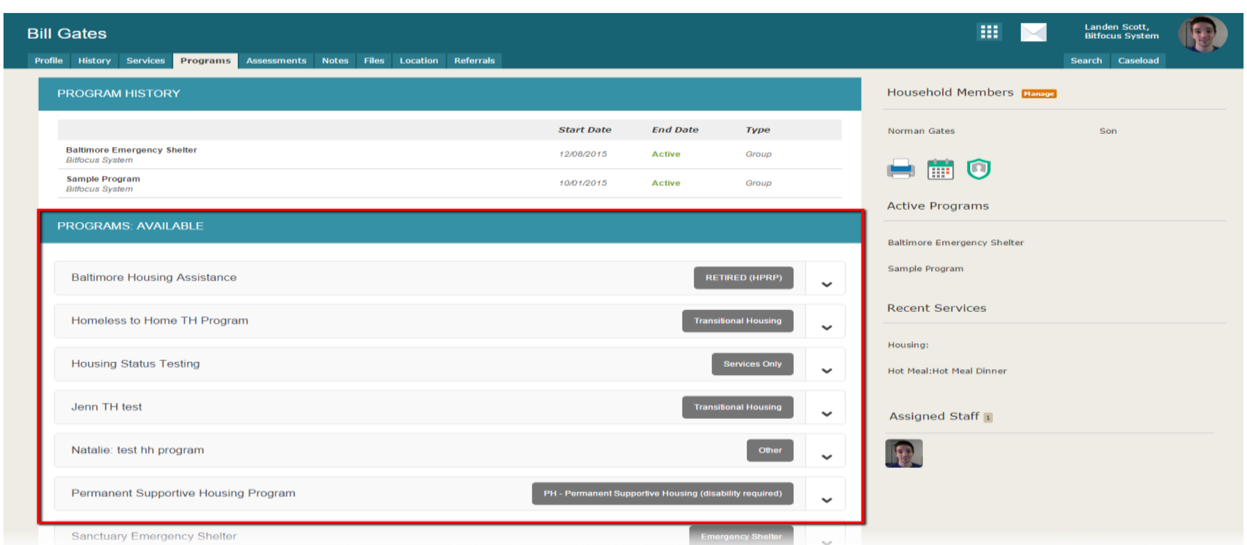
Program History

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.



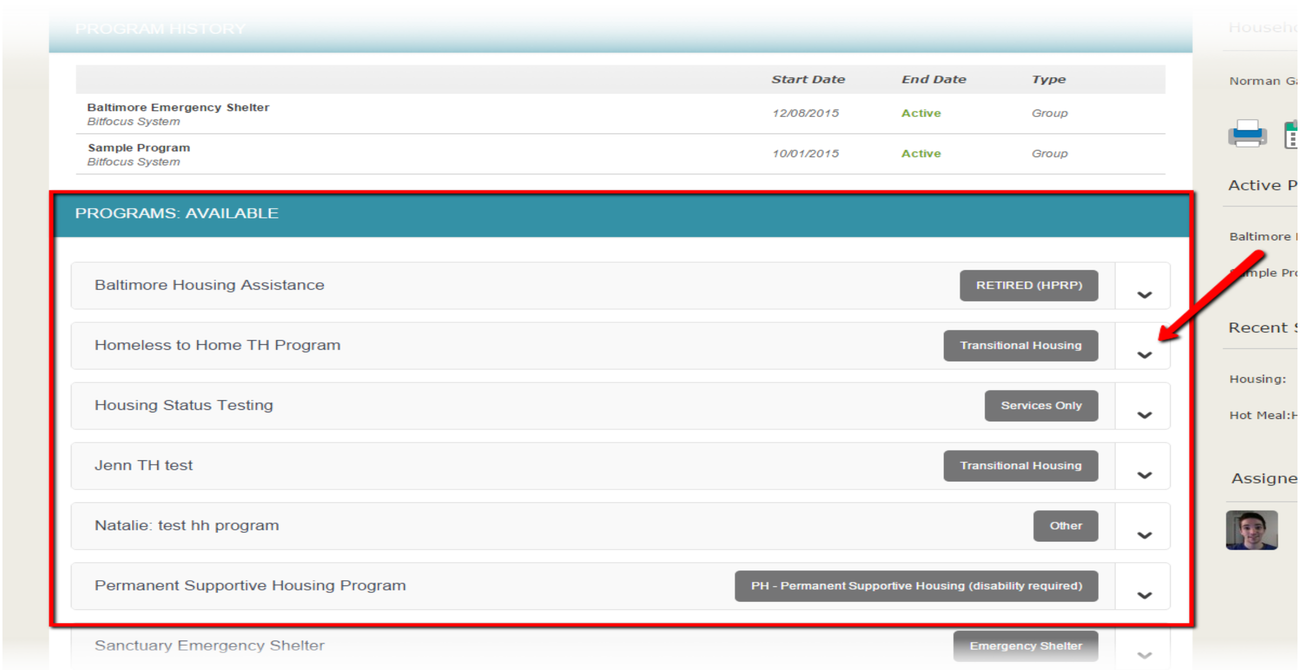
Programs: Available

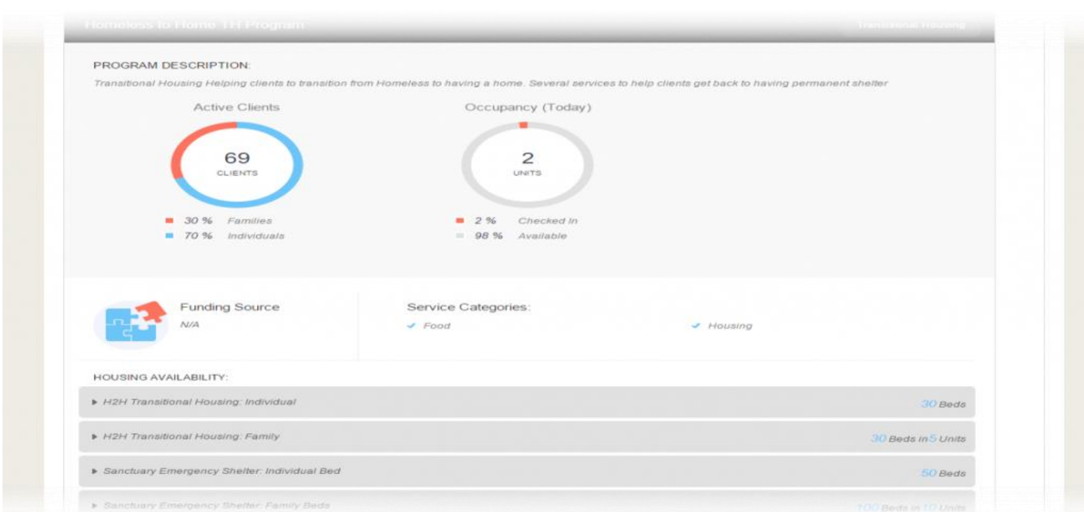
Below the Program History section is the Programs Available section. This section lists current programs provided by your agency that are available for client enrollment. Bill Gates has numerous programs that are available to him. A client may not have multiple open enrollments into the same program.



How to enroll a client/household into a program

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





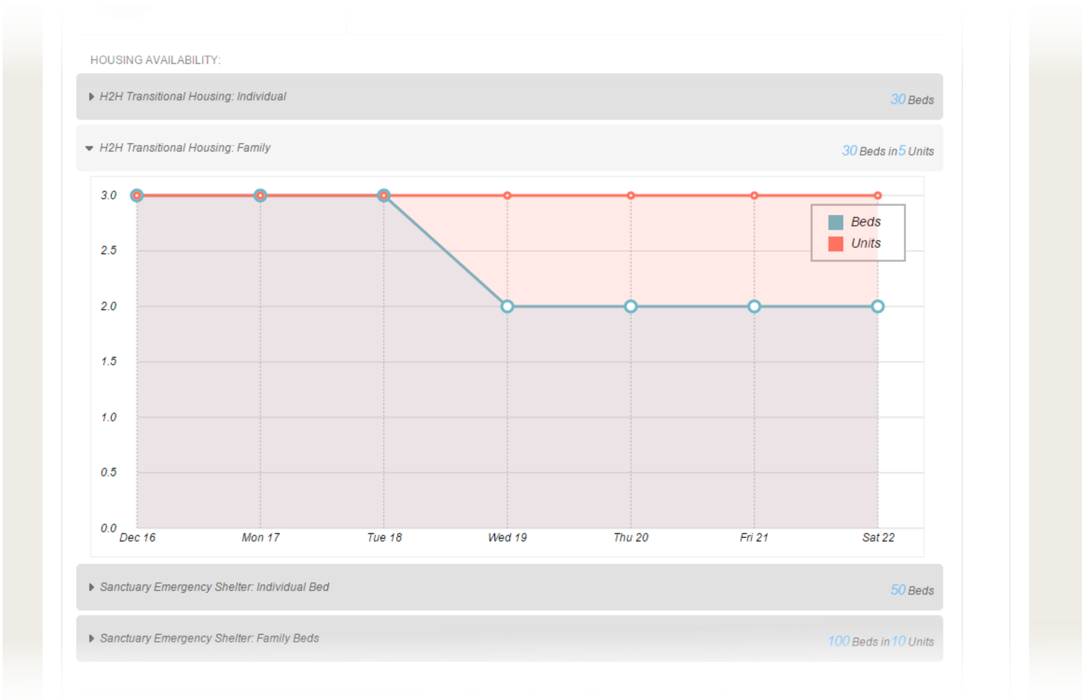
Program Description = The program description provides a brief overview of the program, typically including the target population(s) and general service(s).

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.

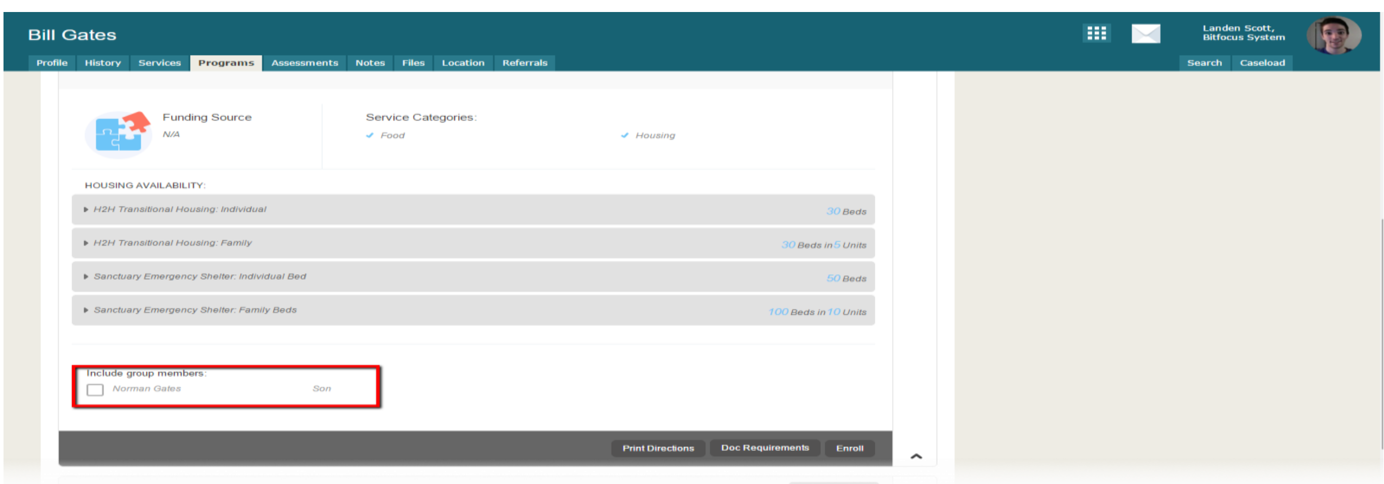
For programs with family housing options available, there will be two columns: Beds and Units (see below). Beds correspond to the number of individual persons in beds. Units correspond to the number of units available. This is particularly useful when enrolling households with children.



a. Household Enrollment Option

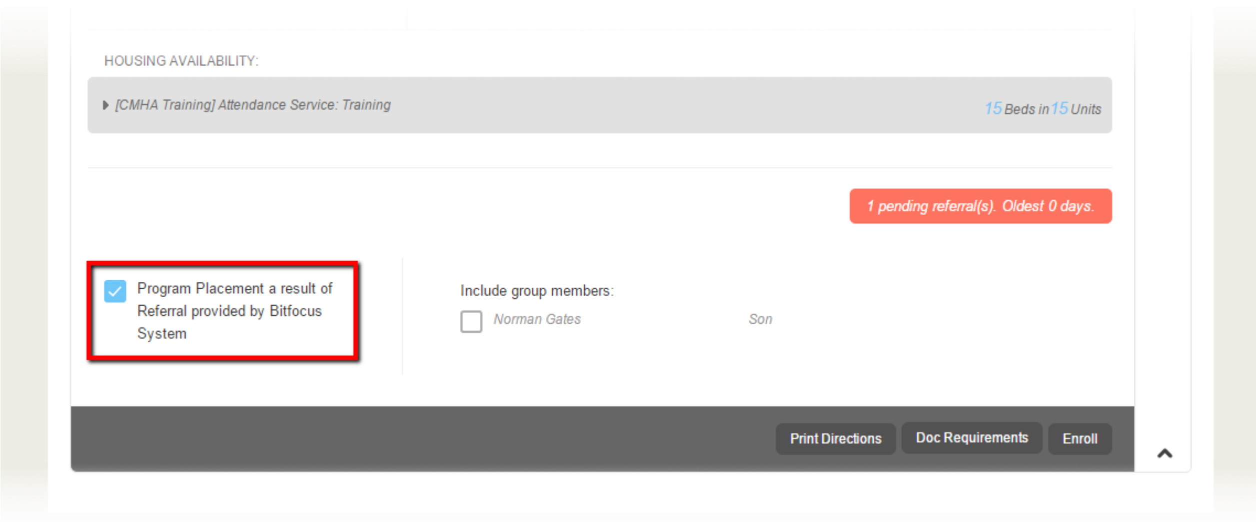
If your client is part of a household/family, you will be automatically prompted to select family/household members to include in the program. It is important to note that family/household members should be previously grouped with your client.

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

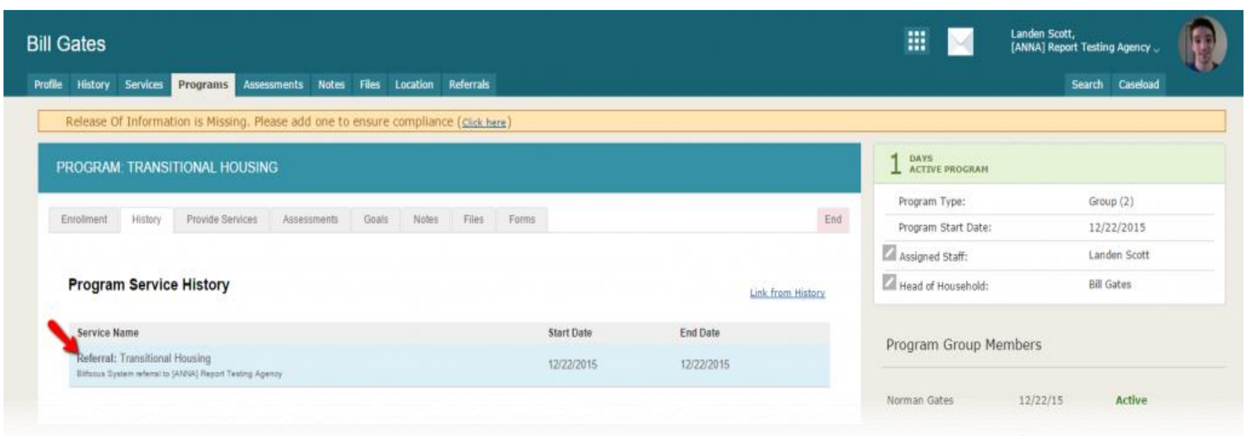


b. Referral Checkbox

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



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.



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

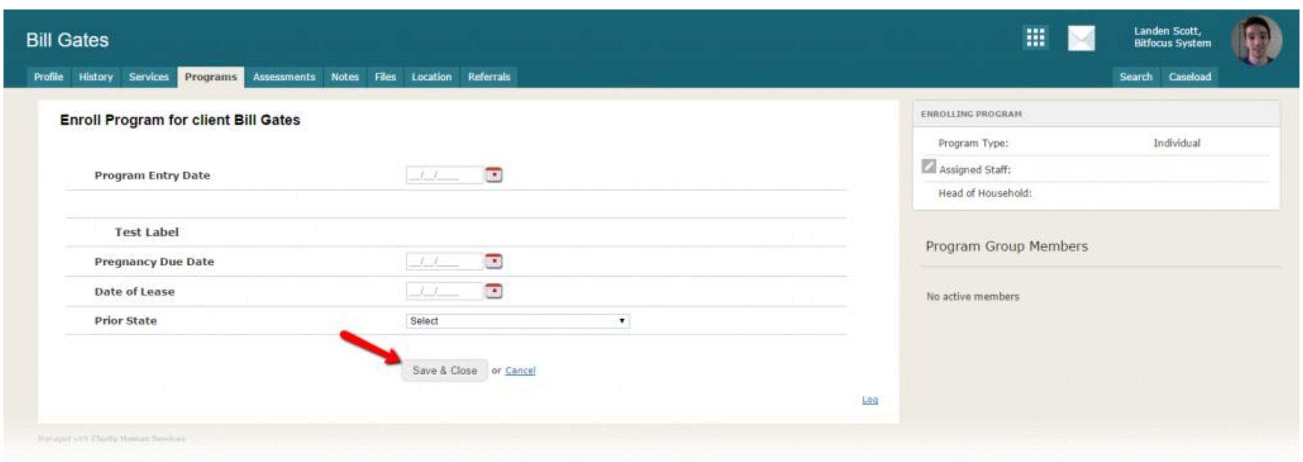
d. Print Checklist

- 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.*



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.

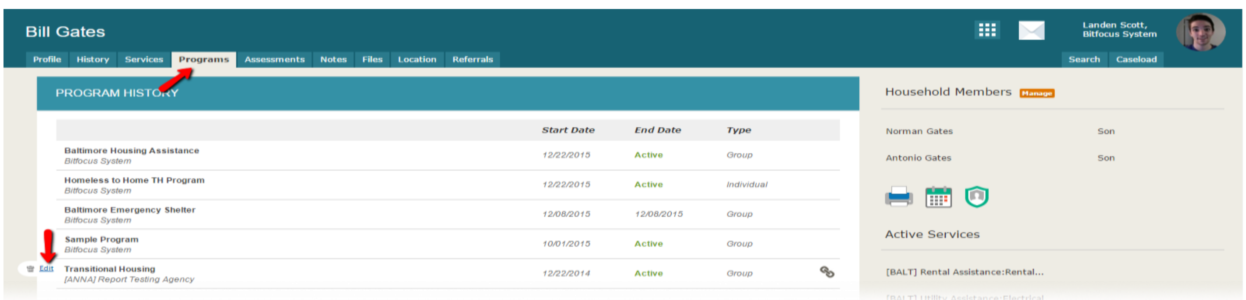
Existing Enrollment

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:

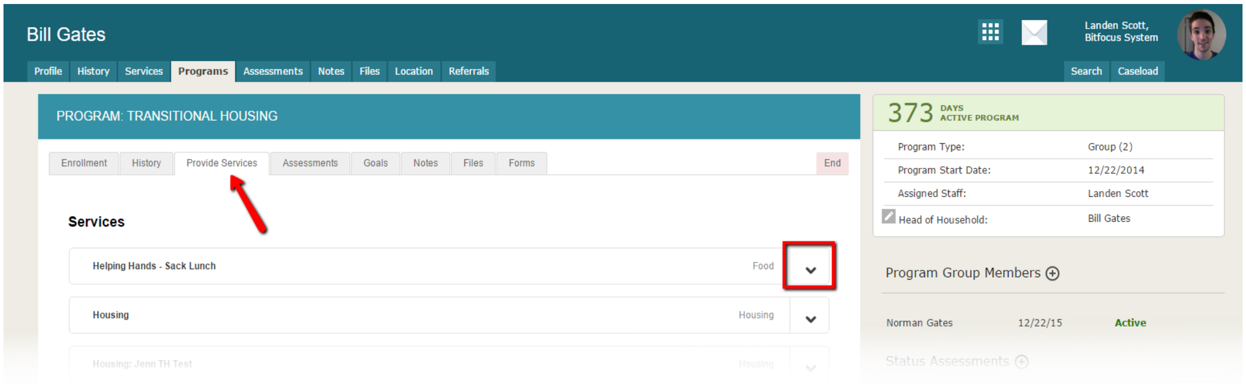
1. Click on the "**PROGRAMS**" tab from the top menu list.
2. Access the program you wish to add services to by clicking **"Edit".**



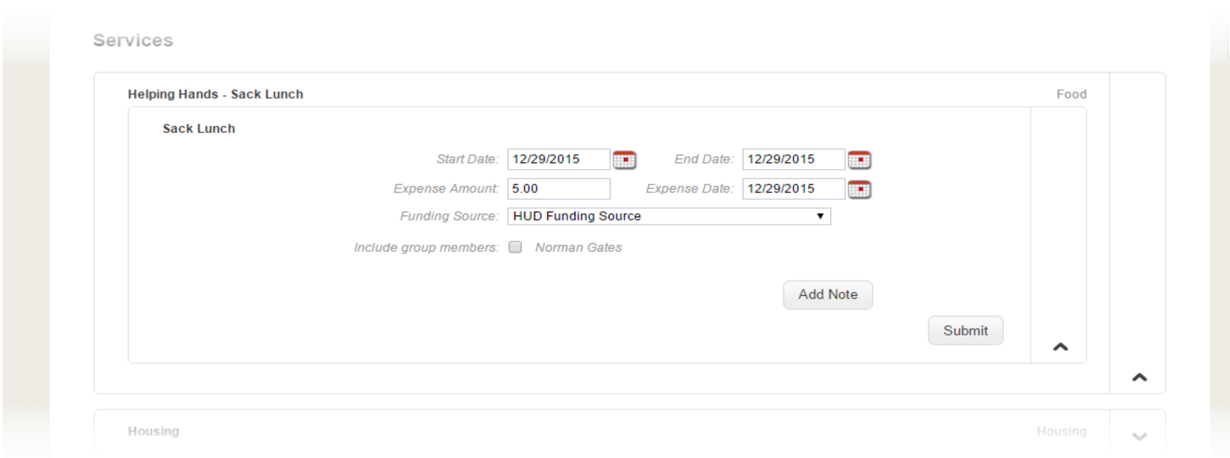
1. Select the '**PROVIDE SERVICES"** tab place a program service for your client.

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.



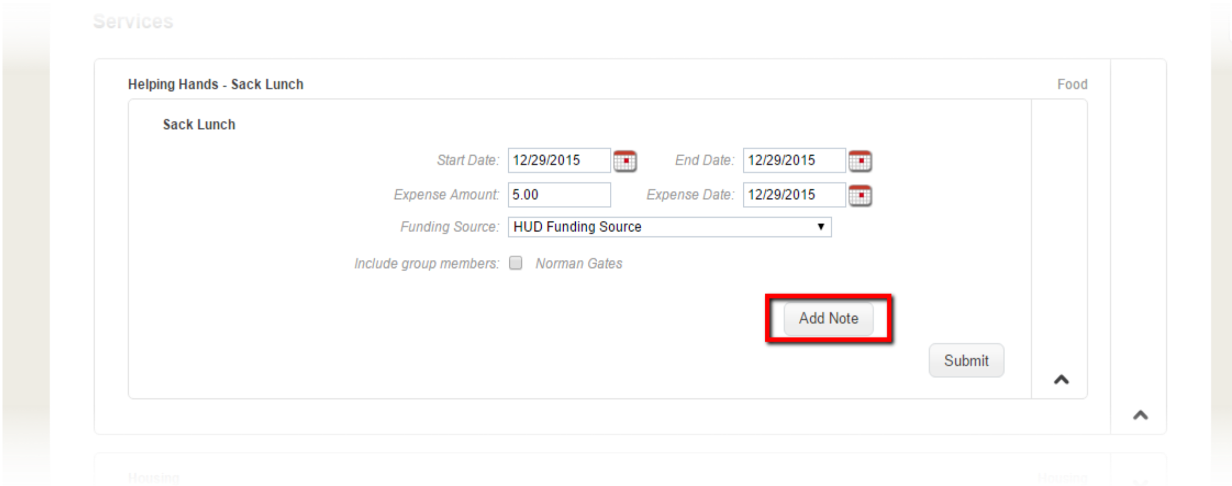
3. After selecting the down arrow, a dropdown screen will appear, providing information about the program service



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.

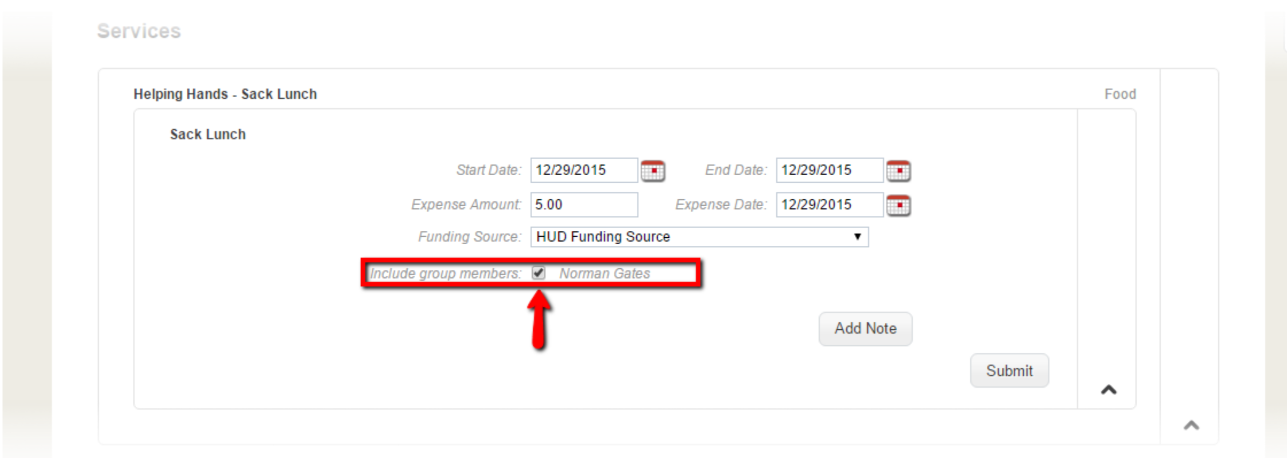
Once the correct dates are applied, and a service note is entered (if necessary) select '**Submit**'.



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.

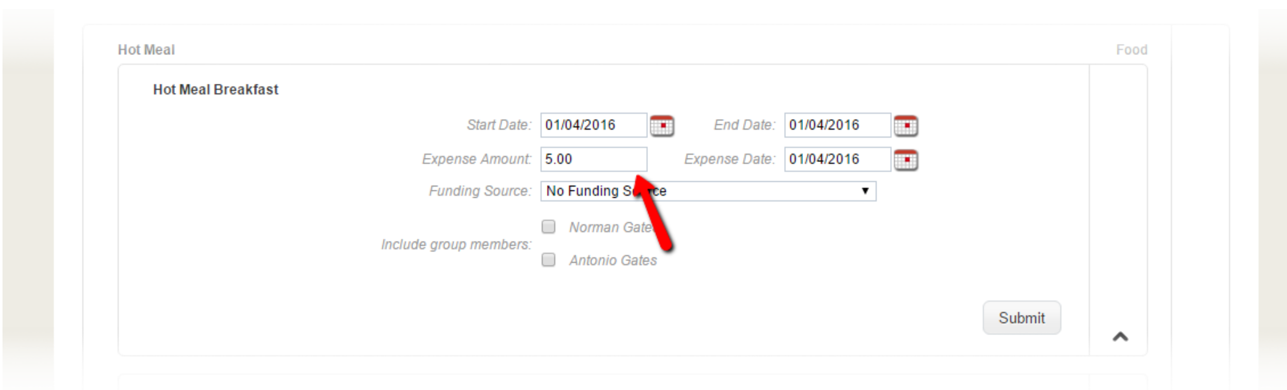


The Service will then be documented in the History tab of every Family/Household member who received it.

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.

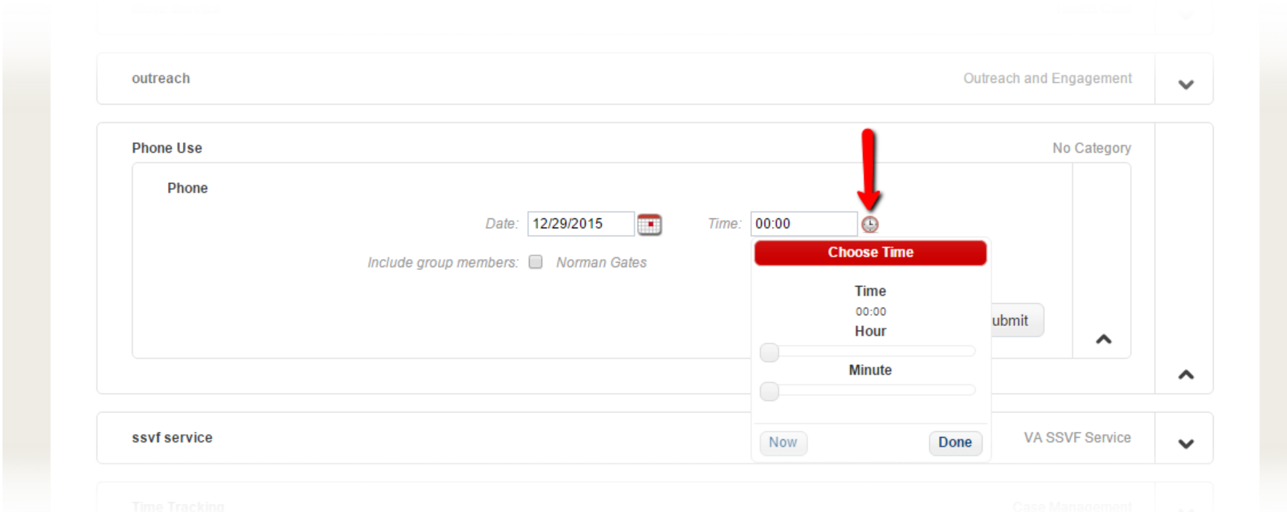
- **Expense Amount:** Depending on the setup of the service, this may be either an adjustable, or a pre-determined amount that cannot be modified.
- **Expense Date:** The date the expense was issued.
- **Funding Source:** Depending on the setup of the service, this may be adjustable, or automatically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



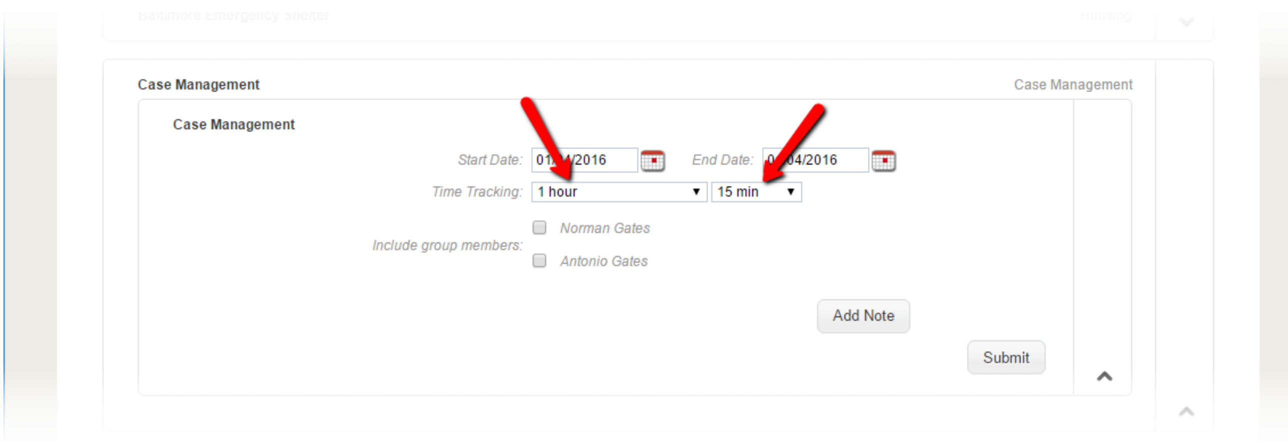
A group placement option may be configured to either provide *all* checked Family/Household members with an identical expense amount, or to only apply the expense placement to the primary client.

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.



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**".



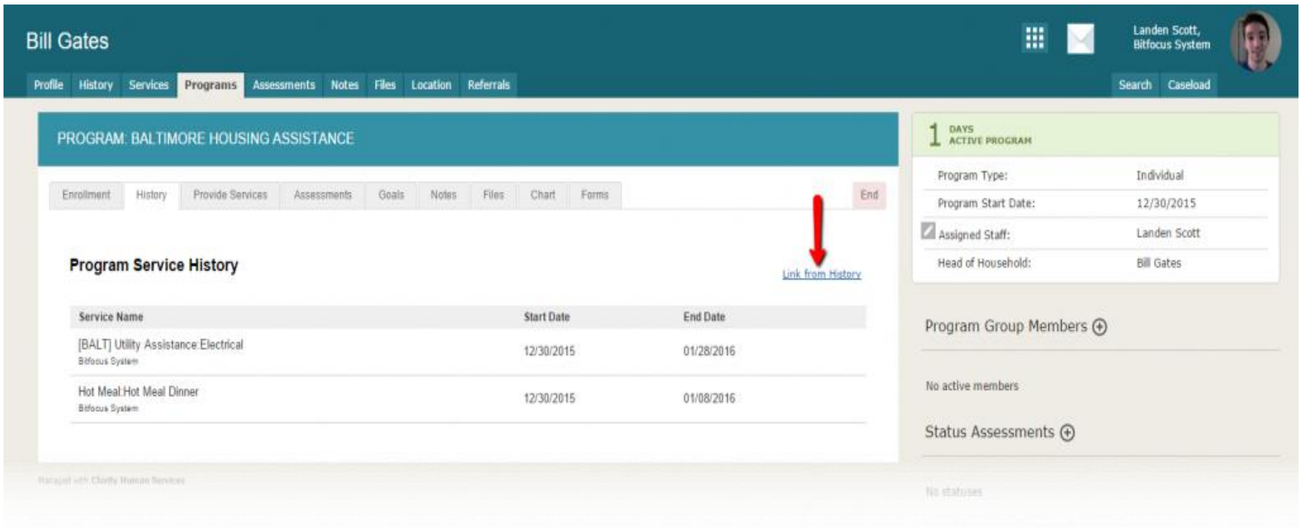
No matter the type of service, clicking **"Submit"** will automatically provide the intended clients with the Service Transaction without reloading the page. You are then free to provide the next service, all from the single interface.

How to link a service to a program

If a program-based service accidently 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,

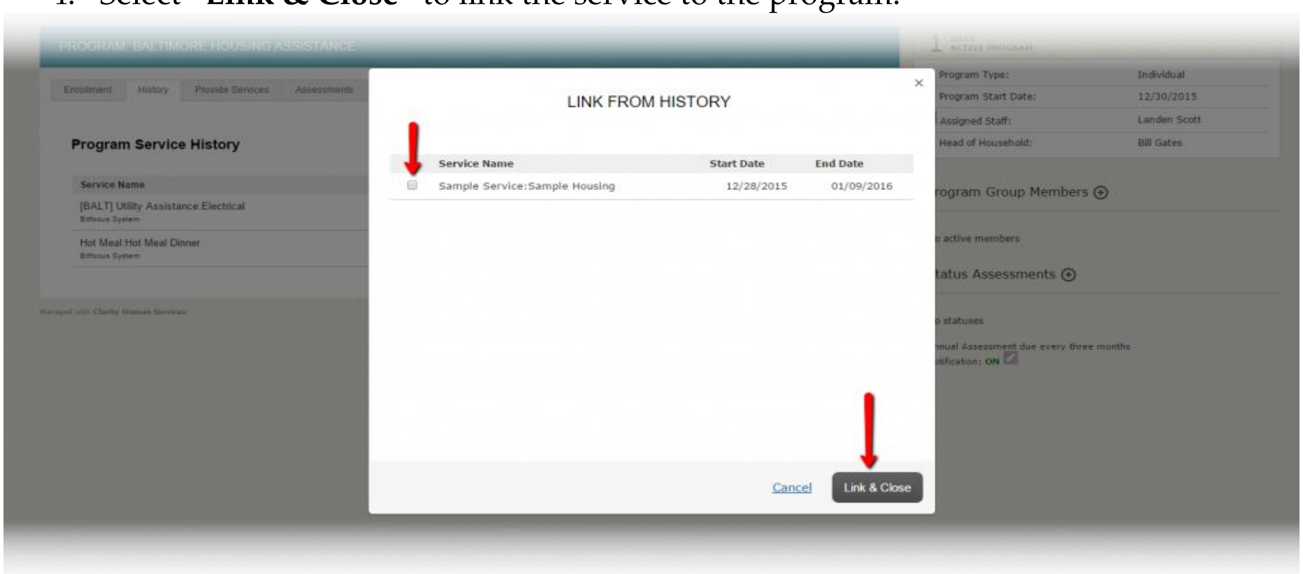
1. Go to the **Programs tab** and select the **"Edit"** link next to the Program.
2. Next, go to the **History subtab** and select the "**Link from History**" link.



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.

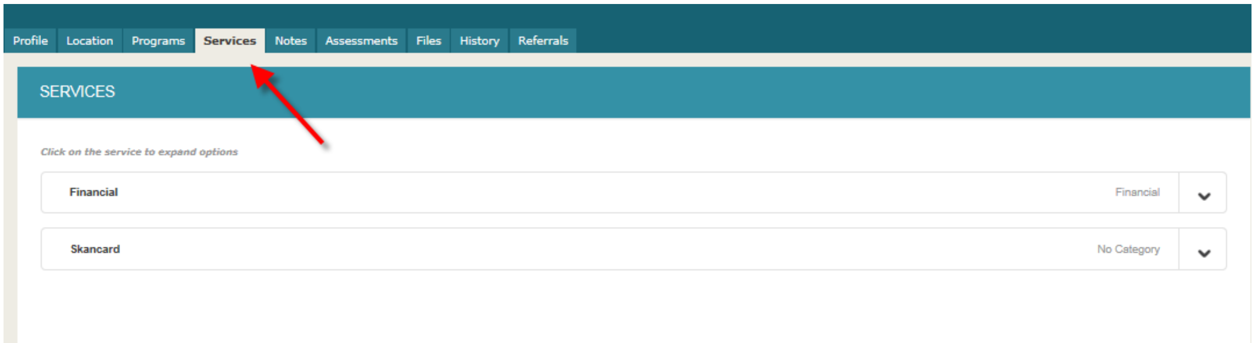
4. Select "**Link & Close"** to link the service to the program.



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.)



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 assesments, enrollement, services and referrals. You can edit and /or view active enrollment as well as closed enrollement.

Understanding History Tab Color Coding

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

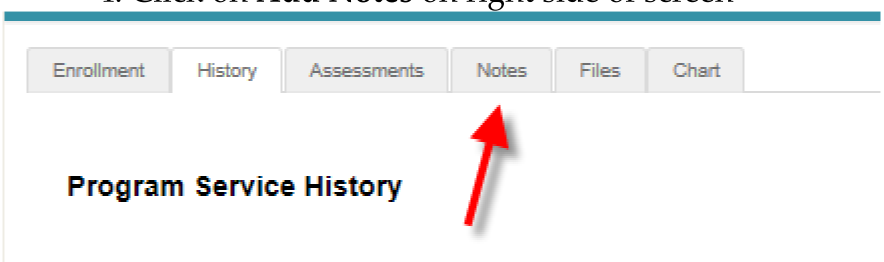
- Programs: Tan
- Services: White
- Assessments: Gray
- Referrals: Blue

HOW DO I CREATE CASE NOTES FOR MY CLIENTS?

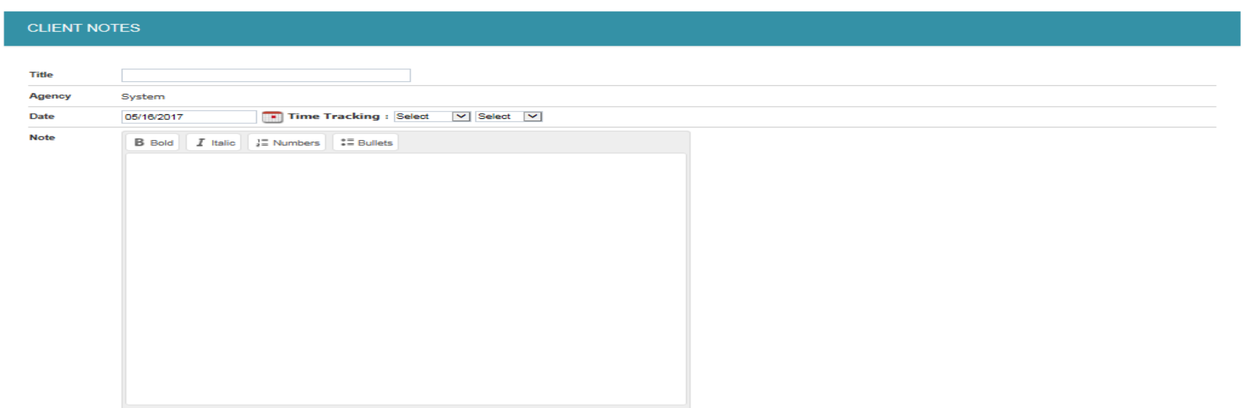
This section discusses how to manage case notes in a client record, including how to create and edit case notes.

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

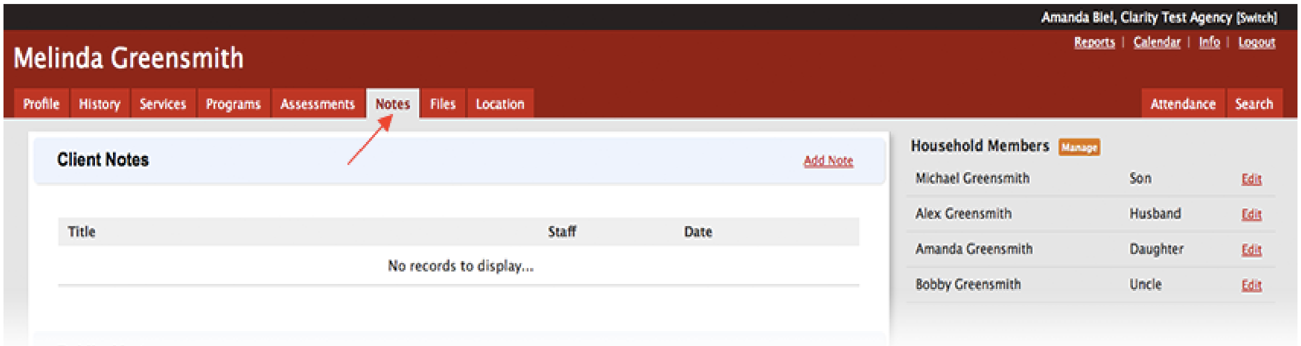


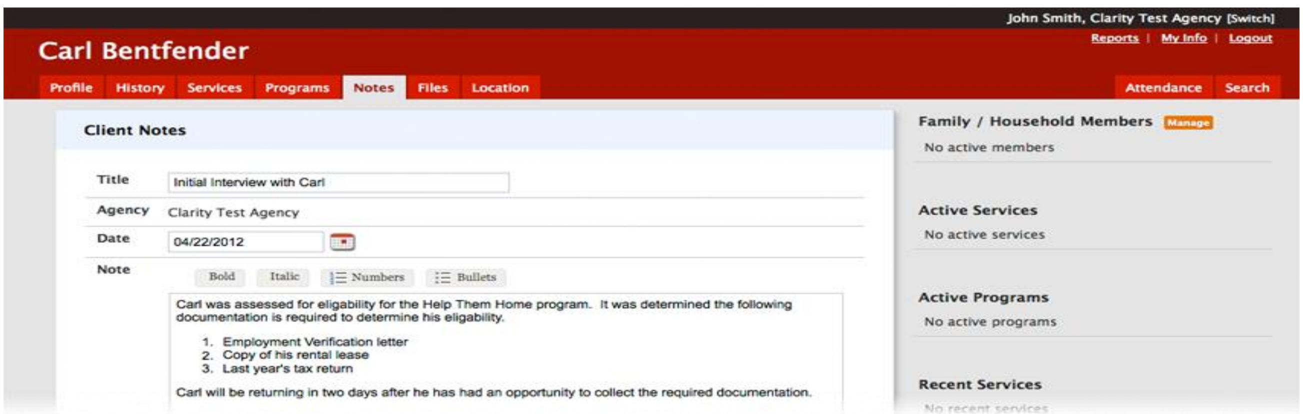
6. Click on **Add record** to save note

Creating Client Notes (Non- Program based)

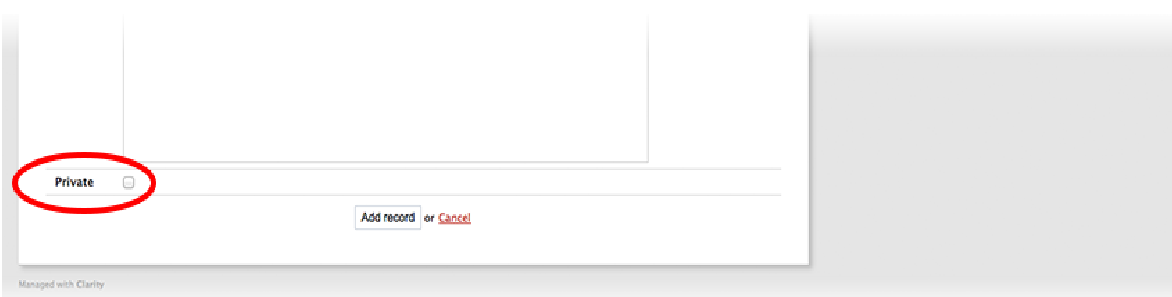
This is for general notes that can be shared across agencies.

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.





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.



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.

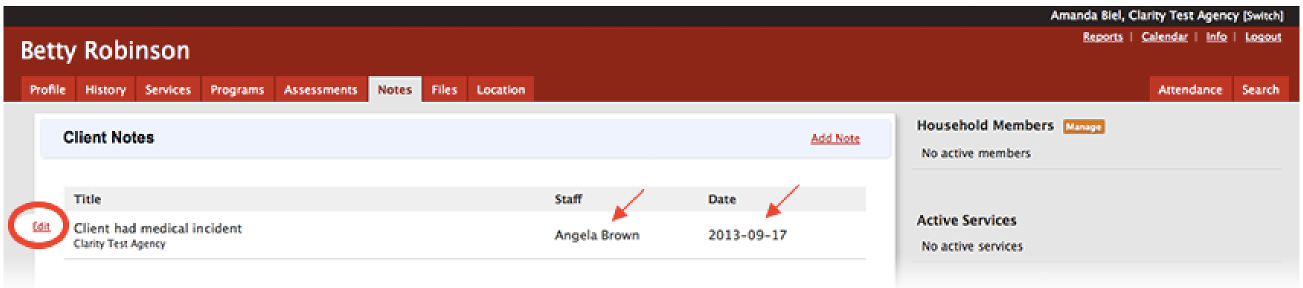
To view and/or edit a client note.

1. Click on **Notes tab**, mouseover the note title,

2. Select the **'Edit'** link that appears to the left.

3. **Edit Note**

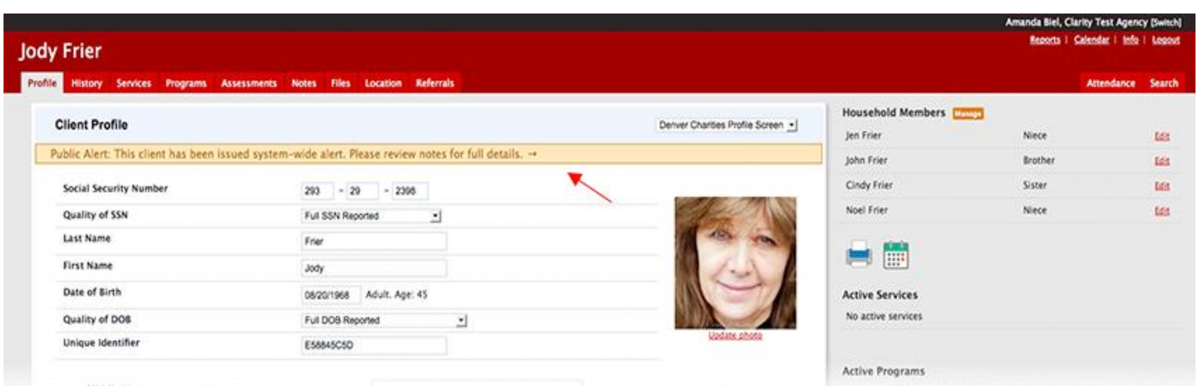
4. Click **Save changes**



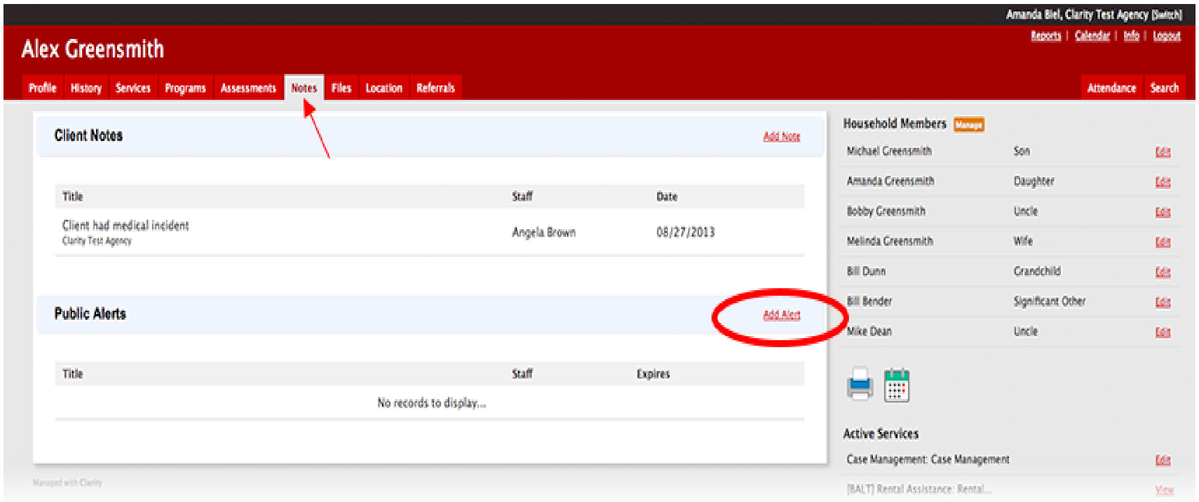
You can also view the staff member who created the note and the date upon which it was created/last modified.

How do I create a public alert?

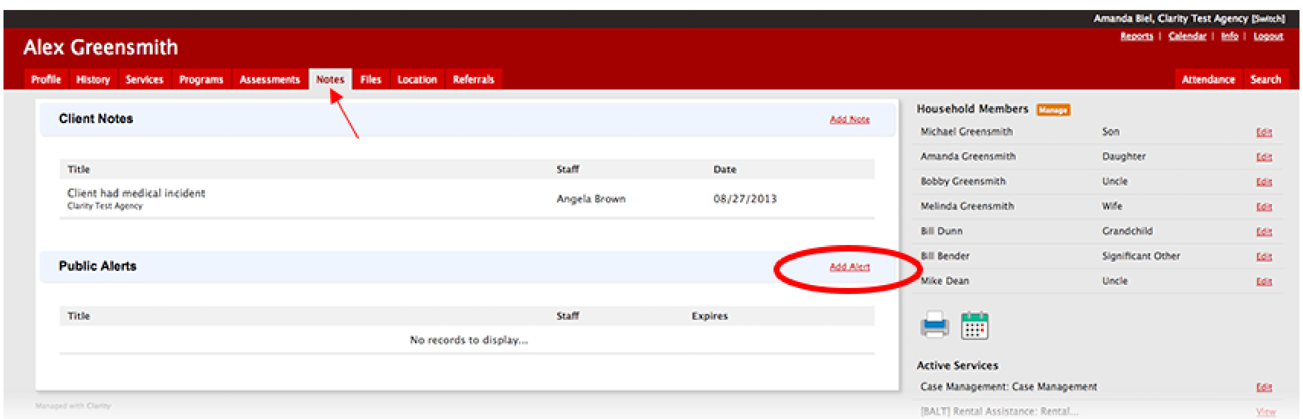
This section discusses how to create Public Alerts. For situations when it is necessary to notify your agency or other agencies, a Public Alert can be created to appear on the client profile page.



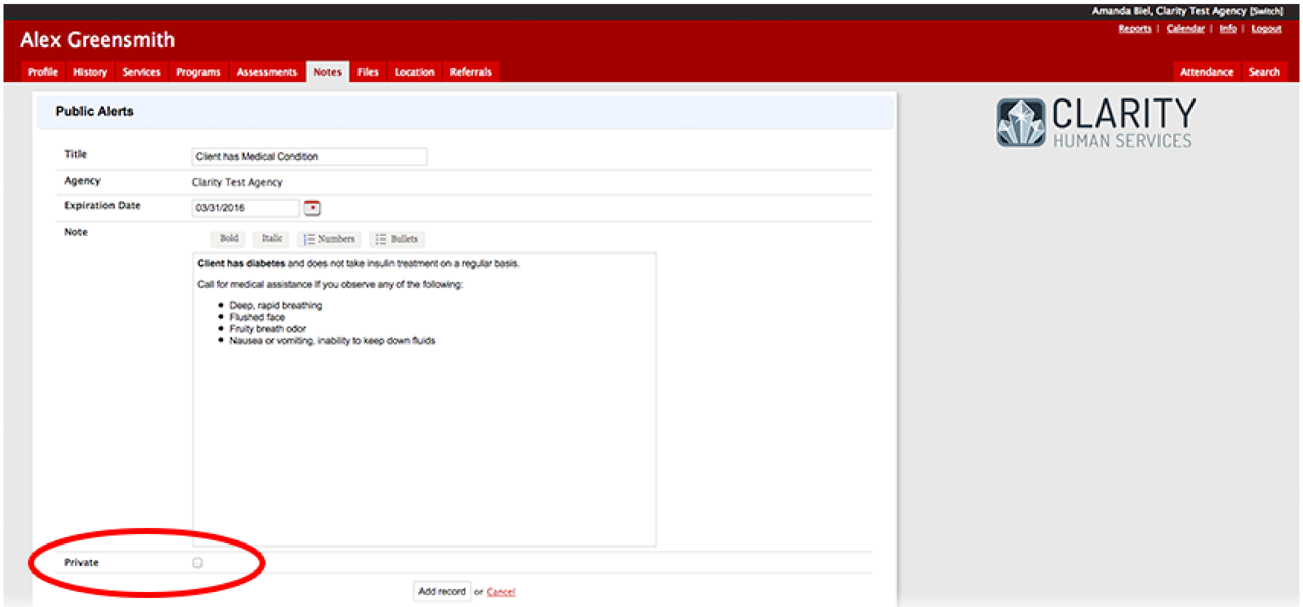
To create a Public Alert, go to the Notes tab in the client profile and select 'Add Alert.'



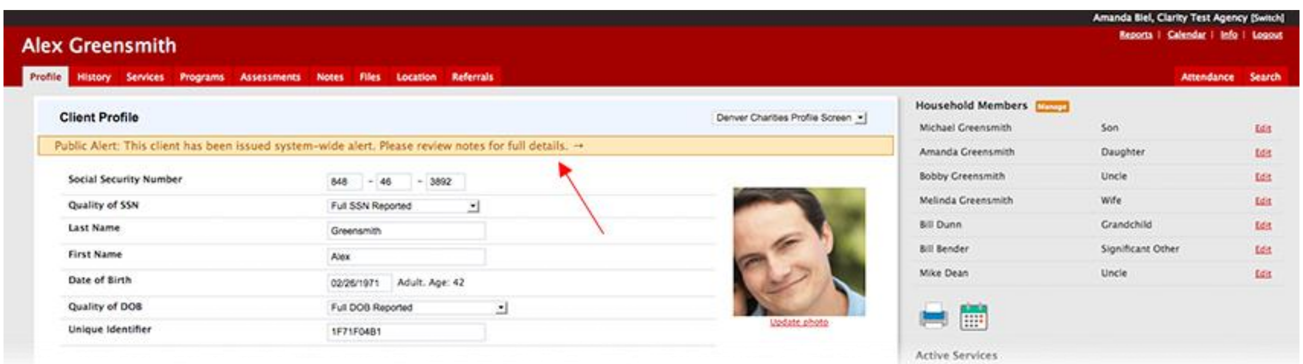
Enter the Public Alert name, expiration date, followed by a note explaining the nature of the alert. (The Agency field will be automatically entered)



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.



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



HOW DO I ADD A STATUS UPDATE OR CONDUCT AN ASSESSMENT

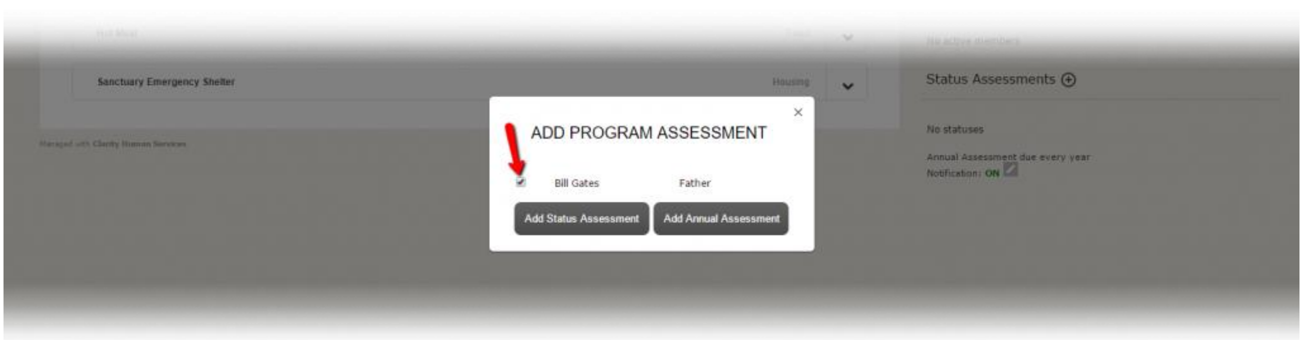
Adding a program-based status update (ex: Annual reviews & General updates)

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.

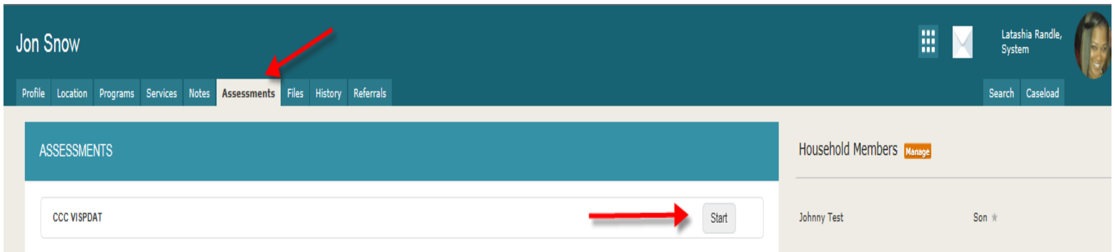
2. Click "**Save & Close**" (or "Save & Next", if you are also doing the assessment for other family members) after you have completed the assessment.

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.

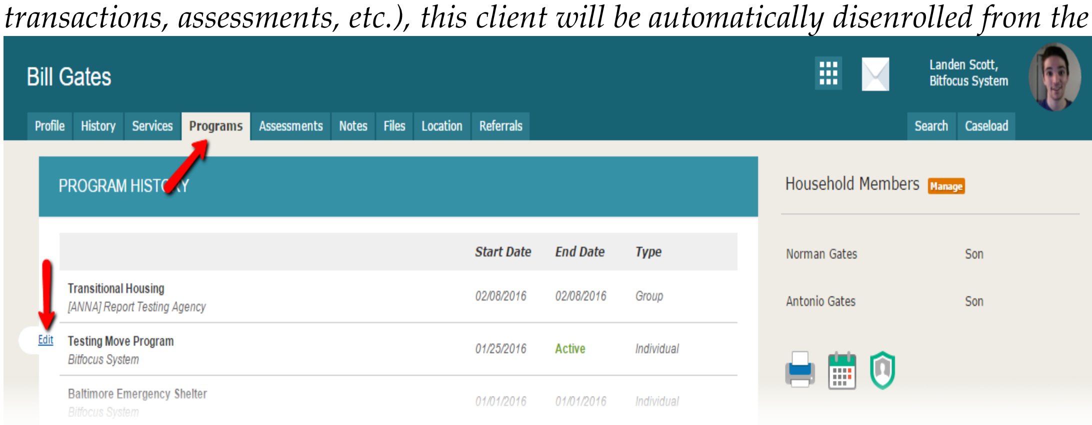
1. Go to the **Programs tab** from the client's record.

2. **Mouseover** the program name

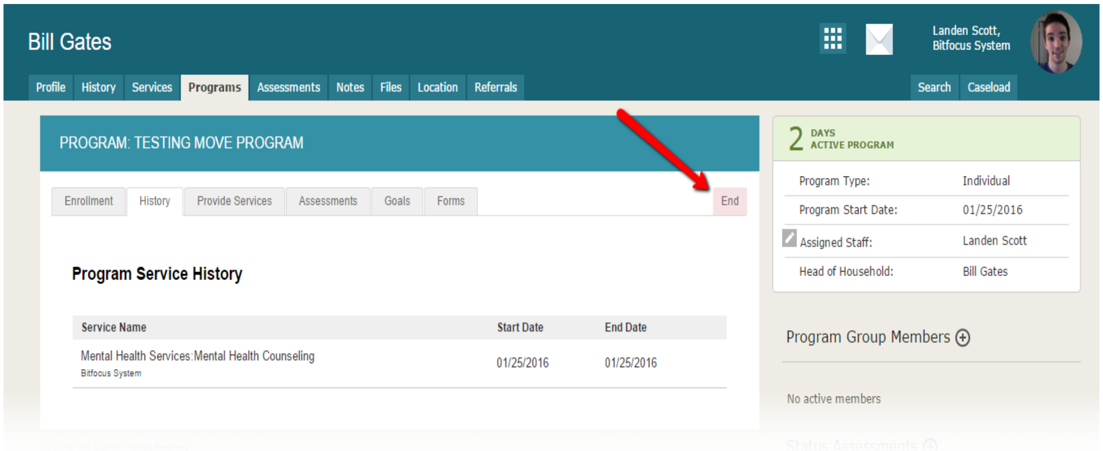
3. Select the **"Edit"** link that appears to the left.

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.*

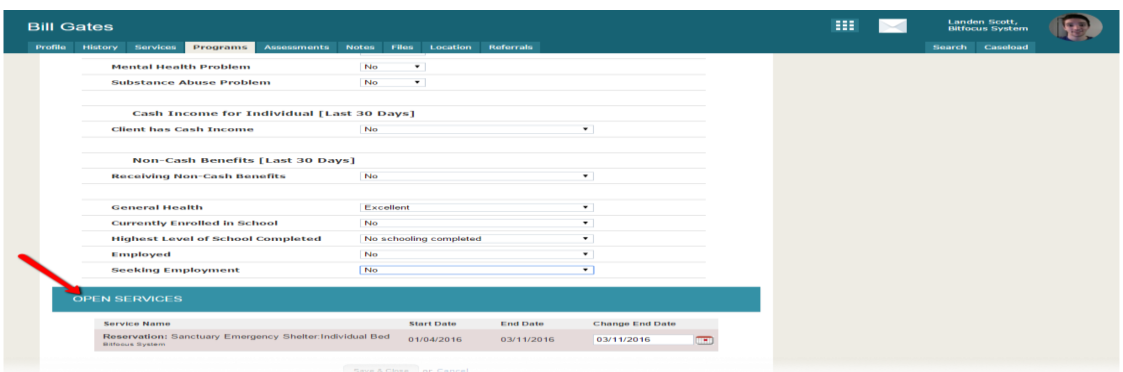


4. Select the **"End"** tab:



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.*

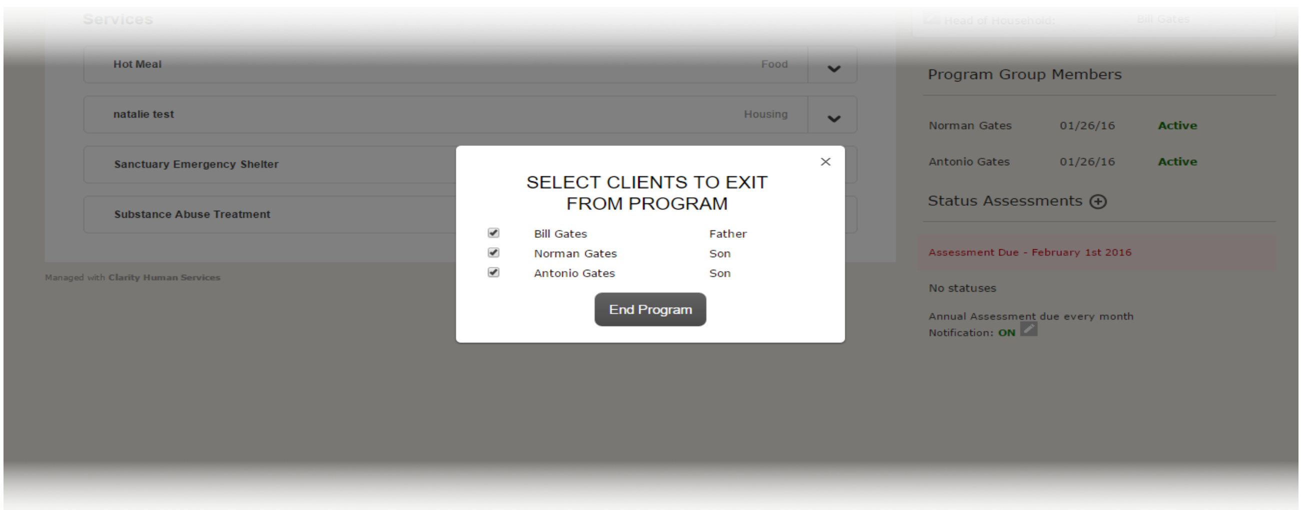


7. Complete the program exit screen and, if appropriate.
8. **Close** any open services.
9. Select **"Save and Close"**.

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