END USER MANAUL

Homeless Management Information System

STRATEGIES TO
END HOMELESSNESS
prevent. assist. solve.

10.2023
WWW.STRATEGIESTOENDHOMELESSNESS.ORG
Cincinnati, Ohio

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Introductions / What is an HMIS?

This Introductory Training Manual was designed by the Strategies to End Homelessness (STEH) HMIS Support team with the new user in mind. It is intended to teach the fundamental aspects of Clarity Human Services software. This training manual contains instructions on all of the key elements within the Clarity Human Services workflow. Please keep in mind that different users have different access roles within the HMIS, so individual users may have more or fewer features visible than what is described in this manual. For additional resources and guides, visit the STEH HMIS Knowledgebase (https://steh.freshdesk.com/support/solutions) or view our HMIS on-demand course offerings at http://steh.talentlms.com .

The Homeless Management Information System (HMIS) is a local information computerized system meant to collect information on persons who are experiencing homelessness to better serve their needs. The HMIS provides an unduplicated count of clients served in the Cincinnati/Hamilton County OH-500 Continuum of Care (CoC). This HMIS software complies with HUD's data collection, management, and reporting standards. The HMIS designated by the Cincinnati/Hamilton County OH-500 Continuum of Care (CoC) is Clarity, by Bitfocus.

Data entered into the HMIS is used to track and improve services provided to individuals and families experiencing homelessness and to understand the needs of people experiencing homelessness in our community. This includes identifying gaps in service, strategic planning for future services, and securing funding for local homeless and homeless prevention projects. Aggregate data is also used by HUD and other policymakers at the federal, state, and local levels to facilitate funding for clients experiencing homelessness.

For the most up-to-date information on HUD HMIS Laws and Regulations: HMIS Regulations and Notices - HUD Exchange and for HMIS Data Standards: HMIS Data Standards - HUD Exchange

HMIS Privacy and Security

Data Security and Computer Requirements

Remember: **You are the strongest security measure in protecting client data.**

All client level data must be kept confidential and protected, especially Personal Identifiable Information (PII). Users and Agencies can download and save data for internal use and are responsible for ensuring the data is secure.   Everything in the system is tracked. Every change that is made is traceable. You, as the user, are solely responsible for what happens under your account. **Do not share your username or password with anyone including your supervisor or agency IT professional.**

For best practices:

- Do not share your username and password. (Sharing will result in immediate Clarity account deactivation.)
- Each HMIS user is required to have completed Basic Clarity Training, authorized Agency approval, and a current signed HMIS User Agreement.
- Never leave documents, personal devices, or a computer open with PII data in a public place.
- Use the Clarity Unique Identifier when sending client data via email. NEVER share any PII when sending client data via email (such as name, SOB, SSN, etc.).
- Sign out after each use. (Clarity will remain open for several minutes even after closing a web browser.)

- Enable a password protected lock screen function when stepping away from your workstation or smart device. You can use the keyboard shortcut "Windows + L" on a Windows Computer or "Control + Command + Q" on a Mac Computer.

Read the complete HMIS Policies and Procedures which includes the Security and Privacy Plan: www.strategiestoendhomelessness.org/what-we-do/data/hmis-transition and Cincinnati/Hamilton County Security and Privacy Plan : (freshdesk.com)

Computer Requirements
- Whenever possible, computers used as an HMIS workstation should be in a secure location accessible only by agency staff.
- Computers in public areas used to collect and store HMIS data must be staffed at all times.
- Computer screens should be positioned so that it is difficult for others in the room to see the contents of the screen. For example, a visitor walking into a common space should not be able to look over an employee's shoulder and read material on the monitor
- Please note, clients have the right to see their own data. Clients may view their own data on a computer screen if accompanied by a Clarity user who will ensure no other clients' data is viewed or printed out and provided to the client.
- Password protected screen savers must be automatically enabled when your workstation is not in use.
- Users must be automatically logged off the system after a period of inactivity.
- Written information with client PII or pertaining to user access (username and password) should not be stored or displayed in any publicly accessible location.

The Clarity Human Services software takes advantage of the latest web technologies. For both security and compatibility, it is extremely urgent that your local IT Staff ensure all workstations are outfitted with the latest version of the Web Browser you use.

The latest version of the following web browsers is supported by Clarity:

- Microsoft – Edge
- Mozilla – Firefox
- Google – Chrome
- Apple – Safari

For the most up-to-date information on Clarity supported web browsers: Supported Web Browsers for Accessing Clarity Human Services – Bitfocus (clarityhs.help)

HMIS User Agreement
The first time you log into Clarity, you will be asked review and sign the HMIS User Agreement. This policy was written and approved by the Cincinnati/Hamilton County OH-500 CoC Board. The user agreement describes the HMIS User Policy, User Responsibilities, and the User Code of Ethics.

The purpose of the HMIS User Agreement is:

- For every HMIS user to affirm the basic confidentiality and privacy rights of all data entered into the HMIS
- Ensure all information collected as a part of the HMIS is protected by complying with the policies, responsibilities, and procedures required of HMIS users

HMIS Client Consent and Privacy Notice Form / Release of Information
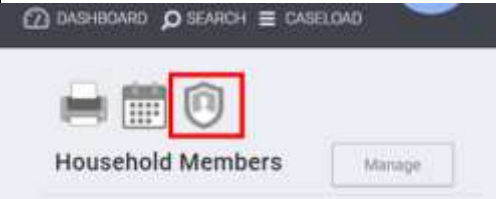
Before searching for a Client Profile in Clarity, <mark>you must ask the client for consent to sharing basic profile information.</mark> Basic client information found on the Client Profile screen may be shared between participating agencies if the client agrees (or consents) to share this information. Sharing information within the HMIS can benefit our CoC:

- Develop and improve quality and increased access of programs, services, and housing that meet our specific community needs
- Comply with state, federal, local, and funder requirements
- Decrease the need for clients to repeat basic information for multiple programs
- Contribute to the health and accuracy of the HMIS Database

It is your responsibility to understand and be able to explain the HMIS Privacy Notice and Client Consent Form to clients.

- Clients **MUST** be given a notification form that explains data collection and sharing guidelines and why their personal information is being gathered.
- Clients **MUST** also be given a consent form, which they must sign and agree to.
- Every HMIS Participating agency is required to post the HMIS Client Consent and Privacy Notice in public view or where intakes are completed.

Follow this recommended workflow when you are enrolling a new client in a program:

| If the Client Consents	If the Client Refuses
Search for the Client Profile If profile exists: • Review/update basic profile information with the client • Update the Release of Information by clicking on the shield icon • Select " Add Release of Information" If profile does not exist: • Add a new Client Profile • Fill out basic profile information with the client • In the "Release of Information" box, select "Yes" • Document the consent • Save and/or Add Record at the bottom of the screen	Do not search for the Client Add a new Client Profile • Fill out basic profile information with the client • In the "Release of Information" box, select "No" • Save and/or Add Record at the bottom of the screen Set the Client to Private • Scroll back to the top and click on the shield icon • Set Client Privacy to "Private"

	• Select "Save Changes"
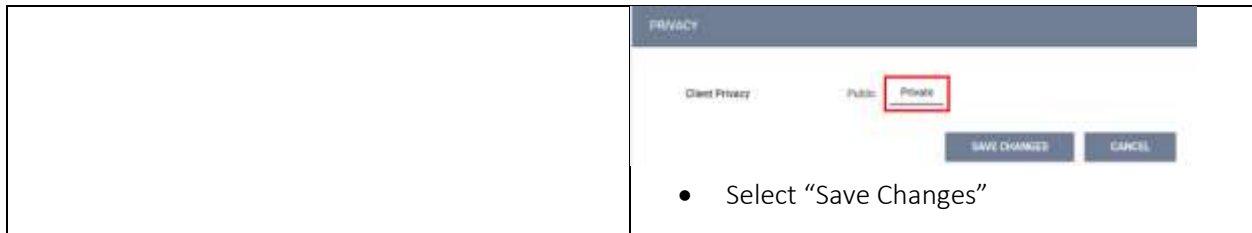
Read the complete HMIS User Agreement: www.strategiestoendhomelessness.org/what-we-do/data/hmis-transition

Agency/Program Specific ROI Forms

Some agencies/programs require their own Release of Information in addition to the HMIS Client Consent and Privacy Notice Form. There are three methods used to upload agency/program specific ROIs into Clarity:

1. Upload to "Files" in the program level navigation.
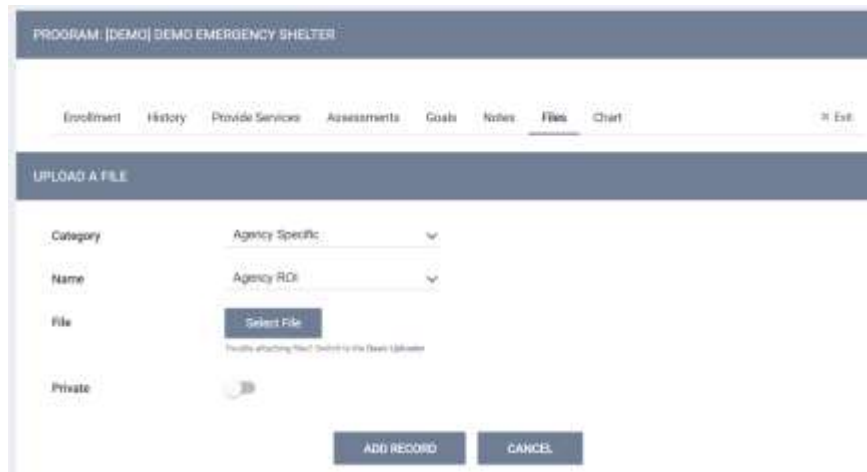
2. Add to "Forms" where a digital copy is included in the drop down list after selecting "Add Form." There is also the option to upload a scanned version of the agency/program specific ROI.

==Please note that the agency/program specific ROI does **not** take the place of the HMIS Client Consent and Privacy Notice.==

==Please speak to your supervisor regarding agency/program specific ROI processes and requirements at your agency.==

Read the complete HMIS Privacy Policy and Client Consent Policy: www.strategiestoendhomelessness.org/what-we-do/data/hmis-transition

Check out these more detailed articles in the Cincinnati/Hamilton County HMIS Knowledgebase: (New) HMIS Privacy Notice and Client Consent Form : (freshdesk.com) and Setting Clients to Private in Clarity : (freshdesk.com)

User Account Settings

Logging In & Two Factor Authentication

Your username and password will be assigned to you by STEH HMIS Support. Upon receiving your log in credentials, open the Clarity website: https://cincinnati.clarityhs.com/login.

YWCA users can access the Clarity Comparable Database here: https://ywcacin.clarityhs.com/login.

Enter your username and password, then click "Sign In."

Two Factor Authentication

The first time you log in, you will be prompted to set up Two Factor Authentication (2FA) to verify your identity. Either with an authenticator app on a smart device or with a code sent to your email associated with your account. There are several apps available for mobile devices. We recommend Google Authenticator for Android and iOS, and Microsoft Authenticator for Windows phone.

Using an Authenticator App: If you choose an authenticator, a dialog box will open prompting you to scan a QR code. Follow the instructions, and the app will automatically generate a 6-digit code. Enter the code in the space provided and click "Verify Code."

Get a Code Emailed: Selecting this option and clicking "Next" will send an email containing a 6-digit code to the email address associated with the Clarity account. Be sure to check your spam/junk folder if you are unable to locate the code via email.

Enter the code into the dialog box and click "Verify Code" to finish the login process.

For subsequent logins, you have the option of clicking the "Trusted Device" box when verifying your login code. If you click it, you will be prompted to enter a verification code after 30 days rather than at each login. Our community policy states you may set your browser to "Trusted Device" when entering data from a secure location within a participating agency. However, if you access Clarity outside the office (in a client's home, or a public location such as a library, coffee shop, or with a client on the street), you should not click the "Trusted Device" checkbox.

User Account Settings

Click on the user initials located at the top right of the screen. Select "Account Settings" to access and adjust user account settings.
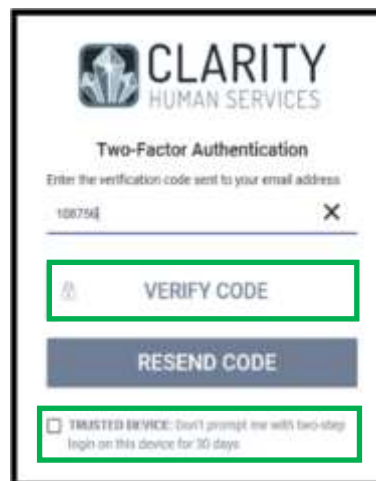
The following settings can be updated or modified at any time:

Some fields that are unique to Clarity include:

Profile Override	This allows users to enter and view different Client Profile data in the client record in addition to HUD required data elements.
Home Screen Override	This allows a user account to be set up with a custom login screen. There are three options: (1) Agency Default – view default agency overview, (2) Client Search – view the search bar, or (3) Custom Dashboard – view a specific dashboard. Contact HMIS Support if you would like the default setting changed.
Recent Services	This allows users to either show or hide recent services on a client's profile screen.
Auto Suggest	Selecting "Enabled" allows Clarity to predict client names and client record suggestions as they type when searching for clients.
Favorite Reports	This allows users to save favorite reports across multiple agencies or to specific agencies. This is applicable to users who have access to multiple agencies.
Assessment Due Warning	When toggled on, the staff member will receive an "Assessment Due" notification by email and in their Clarity Inbox. Users can select the number of days/weeks before the Annual Assessment due date to receive the notification.

Check out these more detailed articles in the Cincinnati/Hamilton County HMIS Knowledgebase: How to Log In and Sign Out, Accessing Your Account , Two Factor Authentication

Main Screen Features and Navigation

Launcher
Select the launcher to view icons that take you to different features within Clarity:
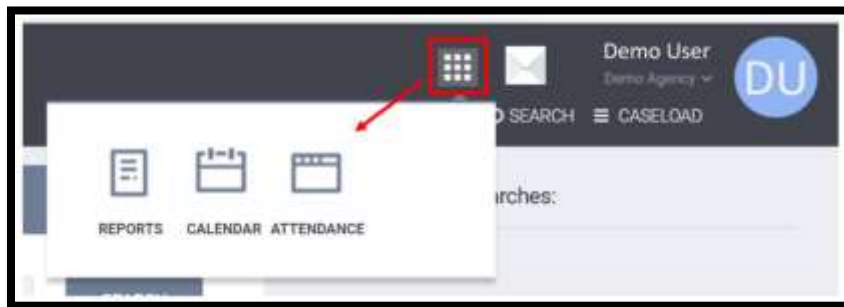
Please note: Depending on your access level, you may have more or fewer icons visible.

For more information on the Reports, Calendar, and/or Attendance features, please reach out to the HMIS Support team for individualized resources or training.

Dashboards
Click on "DASHBOARD" to view your agency dashboard:
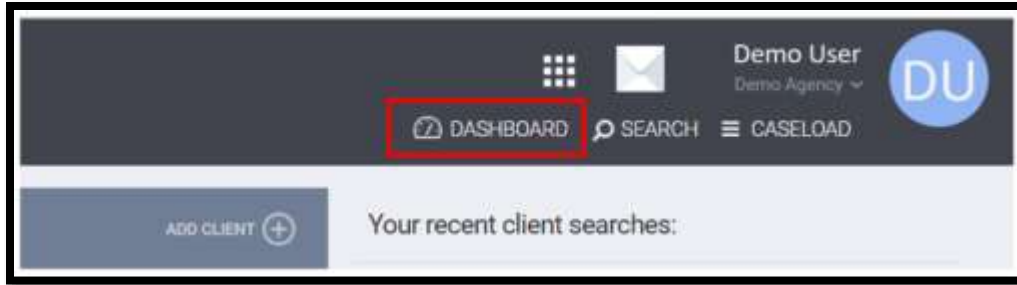
Please note: This feature is only visible to users with Data Analysis access.

Dashboards and other reports can also be found on the Data Analysis tab in the report section. In your Account Settings, you can choose a custom dashboard or Agency default dashboard to view on your home screen when you login (in place of the client search screen).

Messaging

Click on the envelope icon to send and access messages.
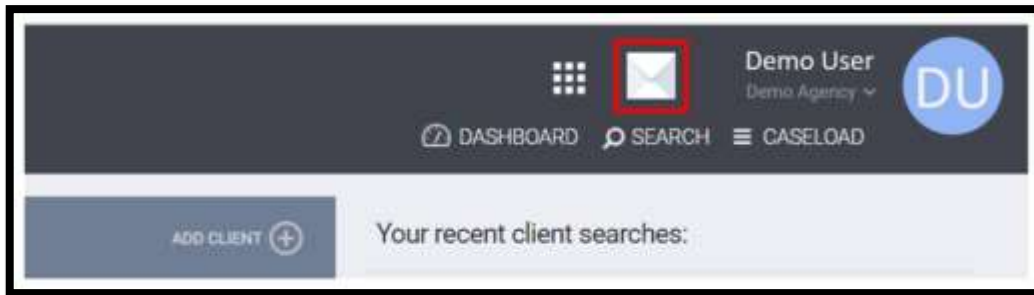
Clarity allows users to communicate through a secure messaging system. You can send messages the HMIS Support Team or other HMIS users. This is the only method of communication in which PII (Personal Identifiable Information) can be shared because it is secured. An email will be sent to your registered email address to notify you when you receive a message within Clarity.

Please note: When *communicating via email or other non-secure methods, only use the Unique Identifier to identify clients. The Unique Identifier is found on the Client Profile screen.*
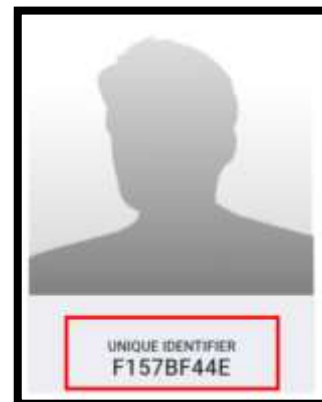
Data Alert Messages

Clarity will alert you if a required field was left blank when adding or modifying data. Scroll to the top of the screen to ensure data was entered accurately and successfully saved. You will see either a Green, Yellow, or Red bar across the top of the screen with a message:

Green: Alert that required data has been entered the screen has successfully been saved.
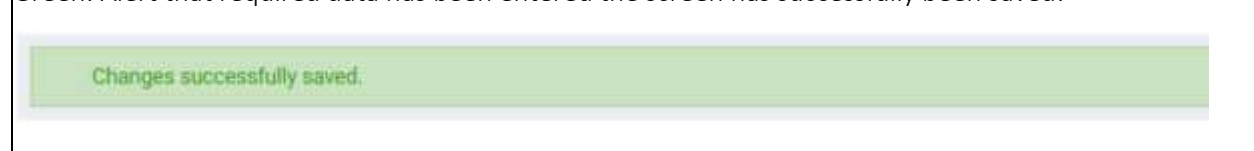
Yellow: Alerts users that some important but not required information is missing or incorrectly entered. The screen has saved as entered/edited but the user may want to check yellow highlighted fields for accuracy

⚠ Release of Information is Missing or Permission Not Provided. Please review to ensure compliance.
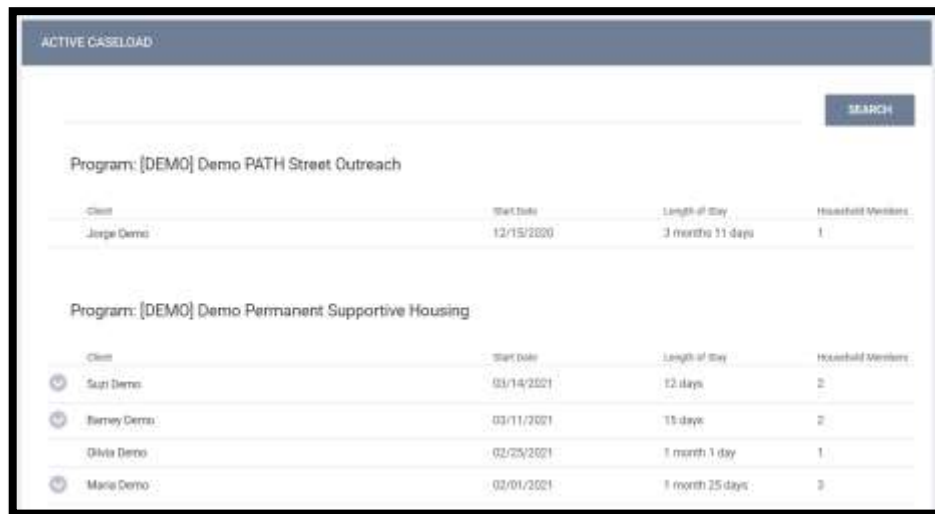
Red: This alert warns users that required information is missing or incorrectly entered. The screen will <u>not</u> save entered/modified data until all required fields have been accurately completed.

⚠ Please correct errors.
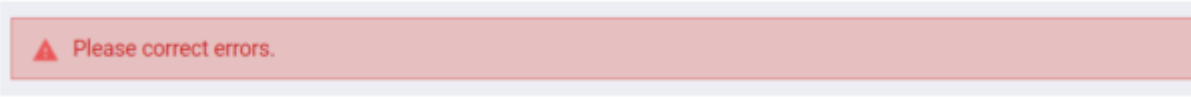
**Please note: These are example error messages. Please read the alert messages carefully in Clarity to resolve any issues.

Caseload

If available to you, a convenient way to access individuals and/or households that have been assigned to you, is through the "Caseload" tab. Clients are organized by program. Clarity will take you directly to a client's specific program enrollment by clicking on a name in the Caseloads tab.

Switching Between Agencies

Some users work within multiple agencies within Clarity and often need to switch agencies. In addition, all users are assigned to "Demo Agency" when first accessing the system. This allows users to practice (client intake, enrolling in programs, running reports, etc.) within Clarity using fake data.
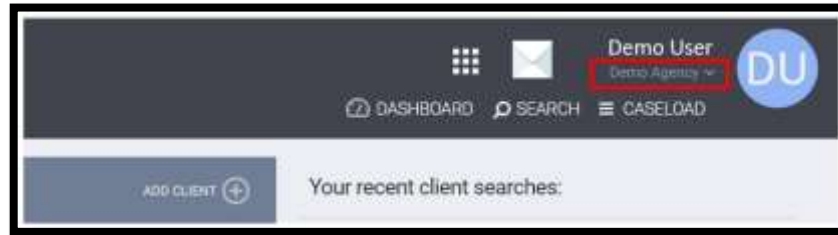
Found under the user's name in the upper right corner, click on the down arrow to switch agencies. When selecting a different agency, clarity will re-direct you to the client Search screen.

Logging out

Click on your initials in the top right corner and select "Sign Out" to log out of Clarity.

Check out these more detailed articles in the Cincinnati/Hamilton County HMIS Knowledgebase:
How to Run Reports : (freshdesk.com), Subscribing to the Calendar – Bitfocus (clarityhs.help),
Managing Attendance Services in the Attendance Module – Bitfocus (clarityhs.help), Managing Custom Dashboards : (freshdesk.com), HMIS Messaging Best Practices : (freshdesk.com)

Searching for a Client

If a NEW client agrees to share basic information, you must complete a client search to ensure a client record does not already exist before creating a new record. If the client does not agree to share basic information, skip this step and go directly to creating a new client record.

To search for a client, the following can be used in the search bar:

- Full or partial first and last name
- Alias
- Date of Birth (DOB)
- Full or partial Social Security Number (SSN)
- Clarity Unique Identifier
- VESTA ID (you must insert a space between the first name and last four SSN digits)

If records are found that match the search criteria, click on the edit icon to the left of the client name to open the client profile. Always confirm additional information to ensure the identity of the client.

Adding a Client Profile

If a client search does not produce a client record or the client has not agreed to share basic information, click "Add Client" located above the client search bar.

Specific data is required to be collected for each individual entered in Clarity. These, called "Universal Data Elements," are required by HUD and are used locally and federally to provide a better understanding of the demographics of people experiencing homelessness, target resources, and position programs and services to end homelessness.

The following are the HUD Required Client Profile Universal Data Elements and Data Quality Markers:

Universal Data Elements	
Social Security Number (SSN) (3.02)	The Social Security Number is the most accurate data element used to identify each unique client. Use zeros for unknown digits. *Please Note: The SSN is hidden from view to protect the client's*

	privacy. Viewing, editing, or modifying the SSN is logged for auditing purposes.
First and Last Name (3.01)	Always use the client's full, legal name when possible. Use the format the client normally uses for identification. *Please note: If applicable, there is a separate data entry field for suffixes.*
Date of Birth (DOB) (3.03)	Used to calculate the client's age and support their unique identification.
In addition to the data elements above, the following information supports system planning of services and understanding of who is experiencing homelessness at the local and national levels:	
Gender (3.06)	Clients have the ability to self-identify with one or more of different gender categories.
Race and Ethnicity (3.04)	Clients have the ability to self-identify with one or more of different race and ethnicity categories.
Veteran Status (3.07)	Clients can answer "Yes" or "No." Veteran status is not dependent on length of duty or discharge status. Additional fields appear when Veteran Status selection is "Yes" to collect more detailed information. *Please Note: The Veteran Status field is only visible when the client's date of birth is 18 or older. If DOB is unknown – or client refuses, please select "approximate or partial DOB reported" and enter an approximate DOB.*

Always verify that the information is correct and up to date with the client.

Data Quality Markers

It is EXTREMELY important that the data is entered as thoroughly and accurately as possible. However, HUD understands that clients might not know or be wary of sharing personal identifiable information, so they have created Data Quality Markers.

- Full _____ reported
- Approximate or Partial _____ reported
- Client doesn't know
- Client prefers not to answer
- Data not collected

The Clarity system uses the HUD required Data Quality Markers to identify if a client's record is complete. If "Full ___ reported" is selected, Clarity will assume this client record can be merged with another record bearing the same Name, SSN, DOB, etc. Therefore, it is vital the correct Data Quality Marker is selected. Selecting "Don't Know," "Prefers not to Answer," or "Data Not Collected" is acceptable and will allow you to save the record; however, each data field on this screen contributes to the overall data quality percentage for the client. **Not making a valid selection in each data field will lower the data quality for the client and impact overall data quality percentages for your agency as a whole.**

In addition to the required data elements above, several optional fields may be available to you on the Client Profile Page. These include:

Optional Data Elements	
Middle Name and Suffix	To provide a more complete and accurate name.
Alias	Nickname, Street name, or other name(s) the client has used to identify themselves – it is also possible to search for a client in Clarity using their alias.
Address	Client address
Phone Number	Primary and secondary phone number options to contact the client
Emergency Contact Information	First and last name of emergency contact as well as contact phone number
Pets	Useful for services that accommodate pets

Complete all data fields on the intake screen with the proper responses. When complete, select "Add Record" at the bottom of the screen. Confirm the data has successfully saved by looking for the Green Banner at the top of the screen.

> Check out these more detailed articles in the Cincinnati/Hamilton County HMIS Knowledgebase: Clarity Profile Screens : (freshdesk.com) and the most up to date HUD Standards here: HMIS Data Standards - HUD Exchange

## Creating and Managing Global Households

HUD defines a household as a single individual or group of persons who either currently live together in one dwelling unit or would live together in one dwelling unit were they able to maintain suitable housing accommodations. Members of a group do not have to be related to meet this criterion.

Clarity allows users to document and track household members even if they are not enrolled in a program together. However, **a group or household must be connected at the global level before they can be enrolled into a project together**. A Global household can be modified or edited at any time and those edits will not impact enrollments that have already been completed.

(This is a feature in Clarity that was not available in our previous HMIS program.)

Creating a Global Household

Newly created client profiles are not automatically part of a family or Global Household. On all client profiles, the "Household Members" section is located on the top right sidebar. From the Head of Household's record, select "Manage" to open the "Household Management" screen. Ideally users will either search for or create new client records before linking household Global household members.
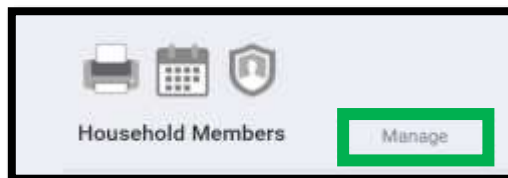
There are two methods to link individual client records to a Global Household:

1. Enter the name of the member in the "Search for a Household Member" search field
2. Find the names on the right sidebar under "Your recent client searches accessed"

Next to the name, select "Add." (A plus sign will appear when you hover over the name.)

The "Add to Household" display box will appear. Choose the member type (Husband, Wife, Daughter, Son, etc.) and Start Date (it defaults to the current date, but select as necessary). Then Select "Save."

Once saved, you'll see the new Global Household addition under the "Household Members." Continue this process until the household is complete.

Managing, Merging, and Exiting Clients in Households

A joining arrow icon next to a client name in the search results means the client is already a member of an existing household. In this case, you can choose to add your client to the searched client's existing household or switch the searched client to your client's household.

1. From Client A's profile click on "Manage" next to 'Household Members' and search for Client B.
2. When you hover your cursor over Client B you see the joining arrow icon indicating Client B is currently active in another global household.
3. Click the join arrow and the Join Household box comes up.
4. *If* Client A is not linked to any household members, clicking the joining arrow icon will launch the Household Management screen to join Client A to Client B's current household.

   - Choose Client A's member type
   - The Head of Household (will default to the current head of household)
   - The date Client A joined the existing household (will default to the current date)
   - Click Save

5. *If* Client A is also linked to other household members, you can choose to exit Client A from their current household and add them to Client B's existing household.

   - Enter the date Client A should be exited from their current household

- Choose Client A's member type in the new household
- Enter the date Client A joined the new household
- Click Save

6. *Or* you could choose to exit Client B from their current household and add them to Client A's household.

- Enter the date Client B should be exited from their current household
- Confirm or change the head of household for Client B's current household
- Enter the member type for Client B for the new household
- Enter the date Client B is joining Client A's household
- Click Save

Exiting a Client from a Global Household

There are circumstances when a Household member exits a Global Household.

- Select "Manage" under "Household Members" on a client profile to open the "Household Management" screen.
- Click on the edit icon next to the name of the person exiting the group.
- Toggle the "Exited Household" option in the "Edit Global Household" display box.
- Enter the date the client will exit the household
- Click "Save."

EDIT GLOBAL HOUSEHOLD

Member Type	Son
Head of Household	Maria Demo
Joined Household	02/18/2021
Exited Household	

SAVE

Check out these more detailed articles in the Cincinnati/Hamilton County HMIS Knowledgebase: Adding Global Level Family Members : (freshdesk.com), Adding a Household Member to an Existing Program : (freshdesk.com), At a Glance_Criteria and Recordkeeping Requirements for Definition of Homeless (hudexchange.info)

Enrolling Clients into Programs

Each program in Clarity represents a project within an agency that an individual or household is enrolled in. **Program enrollments provide the basis for HMIS data collection and reporting.**

## Enrolling a Client into a Program

From the client profile, select "Programs" in the client level navigation (under the client's name). The Programs Tab has two sections:

1. **Program: History** provides a listing of programs your client is either currently enrolled in or has been enrolled in in the past. You will only see the program history for your agency's projects or the projects for agency's you have access to in Clarity
2. **Programs: Available** lists current programs provided by your agency that are available for the client to be enrolled.

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

Scroll down past the program. Toggle on the household members to include, if applicable. Select "Enroll."
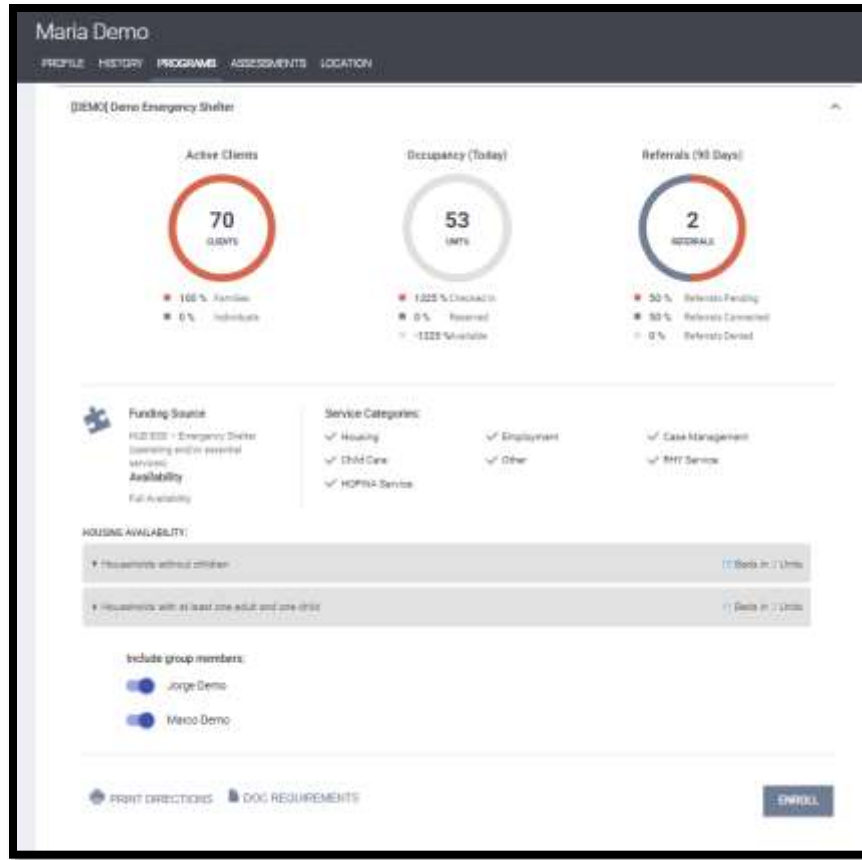
It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to the required Annual Performance Report (APR) for your program(s).

Some fields open additional dependent fields. For example, clicking "Yes" for the "Physical disability" field opens the "Long term/impairs independent living" field, where there is the additional option of "Yes" or "No."

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

Entering Members after the Primary Client has been Enrolled:
To add a household member to an existing program enrollment (such as a new baby)

- Create a client profile or search for the new member.
- Link them to a Global Household.
- Go to the HOH's profile (or any member of the household that is already in the program).
- Select the Programs tab.
- Click the edit button next to the program name.
- Select the plus sign next to program group members (see image below).
- Toggle on additional household members in the pop up dialog box.

- Click the Enroll button and enter the enrollment details for all household members.

<mark>Please note: there is often a delay when adding household member to an existing program enrollment. Allow Clarity a few minutes before the new member(s) will appear in the "Program Group Members" sidebar. In case a member is added multiple times to an enrollment, contact HMISsupport@end-homelessness.org for assistance removing the duplicate enrollment.</mark>
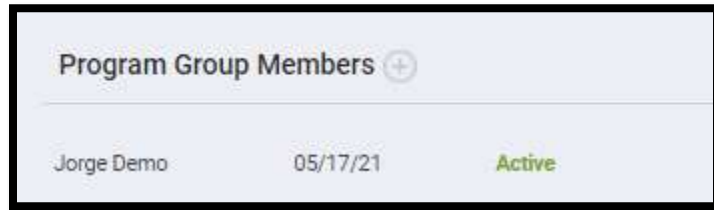
Merging Individual Enrollments

Sometimes household members are enrolled in programs individually rather than as a group.

In case this happens, contact HMIS Support at HMISsupport@end-homelessness.org or call 513-263-2790 and the support team will correct the error.

Program Universal Data Elements

When enrolling clients into a program, there is specific information collected to meet statutory and regulatory requirements of local, state, and federally funded programs. The purpose of these data elements is to obtain consistent information across a range of programs within our community that can be used to plan service delivery, monitor the provision of services, and identify client outcomes. Because there are different sources of funding, there may be more or fewer data elements required when enrolling a client into a program. The following are the most common HUD Required Program Data Elements:

Universal Program Data Elements (Program Enrollment)	
Project Start Date (3.10)	This data is used to track a client's period of participation within a program with the month, day, and year of the start and exit from the program.
Housing Move In Date (3.20)	The date a client or head of household is provided keys to an apartment or housing unit. Enter this date on the Enrollment screen (even if the housing move-in date is later than the project enrollment). This data is critical to point-in-time and housing inventory counts as it differentiates households which have already moved into permanent housing from households which are enrolled in a Permanent Housing project but are still literally homeless (in Emergency Shelter, Safe Haven, Transitional Housing or on the street) as they prepare to move into an available unit. *Please note: A client may only have one housing move-in date per project. If a client moves into an apartment and something goes wrong and the client is moved to a different apartment – you should not change the move in date. However, if the period between moving from one residence to another lasts more than 7 days, you need to exit the client from the program and create a new enrollment.*

Relationship to Head of Household (3.15)	To identify one person to whom all other household members can be linked to at the time they enter a project. This facilitates the identification and enumeration of households. In addition, specifying the relationship of household members to the head of household facilitates reporting on household composition. *Please note: The Head of household for a program can be a different household member than the Global Head of Household*
Prior Living Situation (3.917)	To identify the type of living situation and length of stay in that situation just prior to program enrollment. There is a selection for the type of prior residence and the length of stay. Depending on the response information might also be required on the approximate date homelessness started, and the number of months and times the client has been on the streets, in an Emergency Shelter, or in a Safe Haven in the past three years. This data is used to identify whether a client appears to meet the criteria for chronic homelessness at various points of enrollment. *Please note: Documentation of the Prior Living Situation may be required for program eligibility. The Client Level [Cin- 01] Verification of Homelessness Report serves as HMIS documentation of homelessness; however, additional documentation may be required.*
Disabling Condition (3.08)	Collected to indicate whether or not clients have a disabling condition. This data element is to be used with other information to identify whether a client meets the criteria for chronic homelessness and to qualify clients for PSH projects. One or more of the following: 1. A physical, mental, or emotional impairment, including an impairment caused by alcohol or drug abuse, posttraumatic stress disorder, or brain injury that: 2. A developmental disability, as defined in section 102 of the Developmental Disabilities Assistance and Bill of Rights Act of 2000 (42 U.S.C. 15002). 3. The disease of acquired immunodeficiency syndrome (AIDS) or any condition arising from the etiologic agency for acquired immunodeficiency syndrome (HIV). 4. A veteran who is disabled by an injury or illness that was incurred or aggravated during active military service and whose disability meets the disability definition defined in Section 223 of the Social Security Act. *Please note: Specific documentation of a disabling condition is not required to be collected within Clarity, but may be required for eligibility for certain programs/funding sources*

**For a complete list and description of universal and common specific program elements, please review section 3 and section 4 of The HMIS Data Standards Manual found here: HMIS Data Standards - HUD Exchange.

***For a complete list of the living situation response categories, please see Appendix A of the HMIS Data Standards Manual

Service Transactions

When all enrollments have been completed, click on the "Provide Services" tab. Here, you'll see a listing of services, which vary by both program and agency.
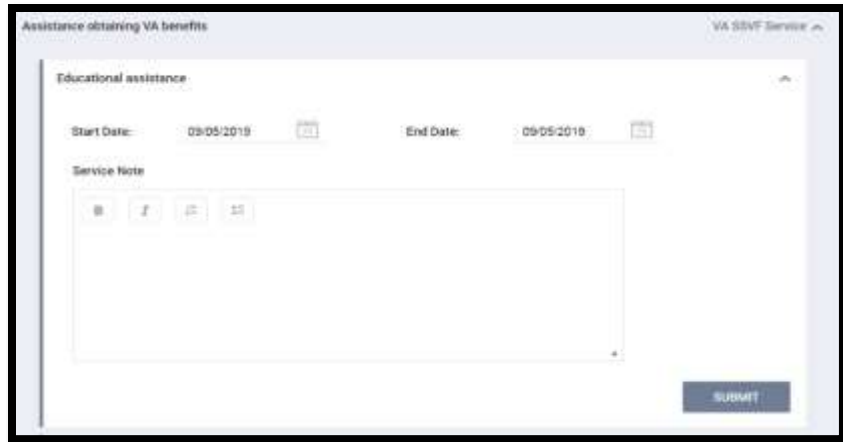
Click the down arrow to expand the service field.

When needed, click the down arrow in the next field to open the service item.

Enter the start and end dates for the service. Note: Both dates must be the same. You can enter notes and other information which will vary depending on the service. When done, click "Submit" to save.

Continue entering services as applicable. Please meet with your supervisor for specific requirements regarding services for your agency's programs.

When saved, both the program enrollment and associated services are visible from the Client Level History screen.

If future services are provided as part of this program, return to the Program tab in the client file. The active program will be listed. Mouse over and select "Edit". Select "Provide Services" and follow the above steps for Placing Services.
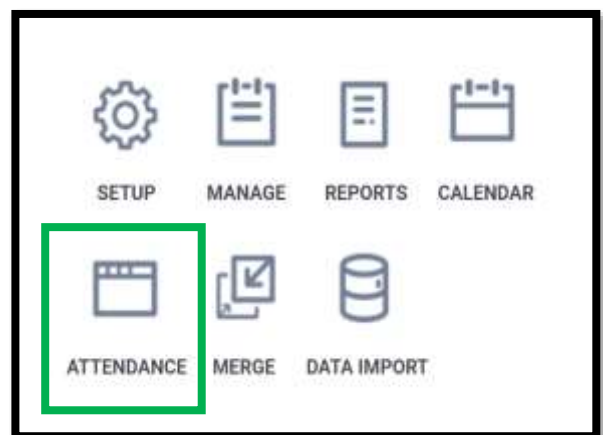
Daily Attendance Service Transactions

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

Services that require daily entry, such as emergency shelters, are entered into Clarity HMIS using the Attendance button located in the launcher.

Note: You will only have an attendance button in your launcher if your agency has requested this feature. You can contact HMISsupport@end-homelessness.org to request this feature.

After clicking on the attendance button, a list of services available for daily intake is provided.

Select the date from the calendar. Below the calendar are two columns:

A. In Attendance. This lists the clients currently attending for the date selected.
B. Clients from last 4 Months. This shows all clients who have attended at least once in the last four months.

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

You can remove a client from attendance by clicking on the trashcan icon in the attendance roster. This will return them to the 4-month roster.

To check in clients who have not been in attendance in the last 4 months, use the client search function in the upper right corner of the screen. Enter the client's name and click SEARCH. When the client's name displays. Click on the "Add symbol" to include clients in the "In Attendance" roster and add the service to

the client's record. When using the attendance tool for households, click on the down arrow to open a list of all household members.
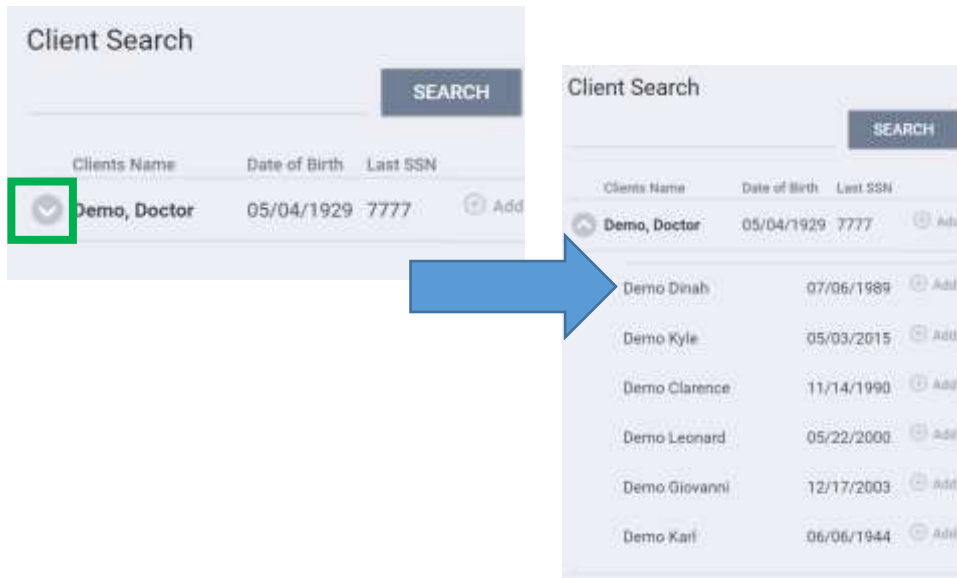

Notes, Files, and Forms

Notes, Files, and Forms are located in the Program level navigation. These may or may not be visible to you depending on your access level/specific program set up or agency use.
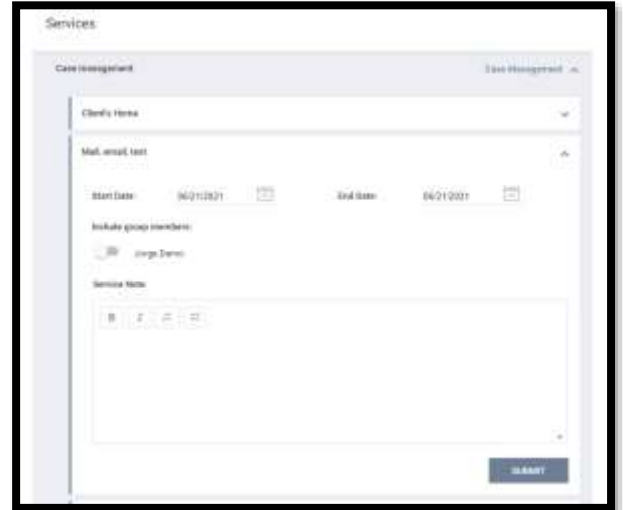
NOTES

Notes are used to document client meetings and interactions, as well as specific client details that are not collected within Status Update assessments or services.

Some programs enter client notes using the "Notes" tab on the client level navigation while other programs use services to enter notes. Discuss the specific requirements for your program(s) with your supervisor.

1) When using the Notes tab to enter Client Notes:
    a) From the client Profile, click on the PROGRAMS tab.
    b) Scroll over the appropriate program and select the edit icon.
    c) Click on the program level Notes tab.
    d) Click on 'Add Note'
        i) Use the "Title" and "Category" fields to help you identify the topics covered within the specific notes. This will help you identify what is included in the notes if you need to access a particular note later from the Notes history.
        ii) You can also run a client level report which will include all notes within a specific date range.
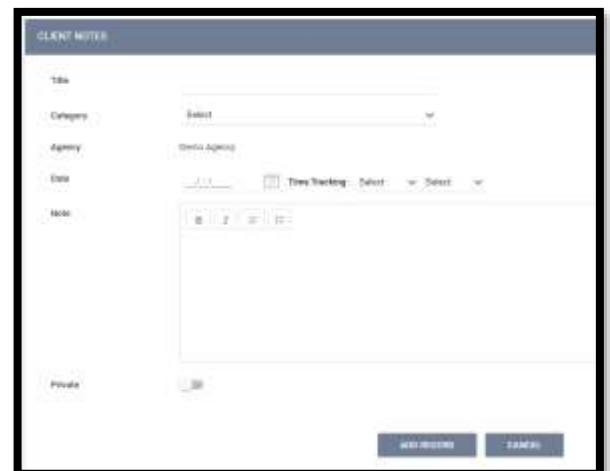
2) When using services to enter notes:
   a) From the client's Profile click the PROGRAMS tab and click the edit button next to the appropriate program.
   b) Click on the Provide Services tab.
   c) Choose the service that is most appropriate for adding notes (Usually the case management or encounter service)
   d) Click the down arrow next to the service. If needed choose the appropriate service sub item.
   e) Enter the date of the note in the start and end date field. Enter any other applicable data and the note. Click submit.
   f) Notes entered as services will be available from the Client or Program level History tabs. You can hover over the conversation bubble to view the content of notes entered in this way.

Please note: One or both of these methods may be available to you. Please speak with your supervisor to confirm how your project collects client notes.

FILES

Files is a feature that allows scanned documents to be uploaded and saved into a client record in Clarity. This can include specific files required by your project, like leases or utility bills, or files you want to keep for the client, like IDs or birth certificates.

In order to add a file to Clarity, you will need to make an electronic copy by scanning or saving the document. Clarity is able to support a variety of file types including PDF, Word, and images.

1. From the program level select the "Files" tab and click "Add file."
2. Select the category and name that is the most appropriate for the file you are uploading.
3. Click "Select file" and navigate to the file you would like to add to the client record.
4. Select "Add record." The file is then added to the program "Files" tab.
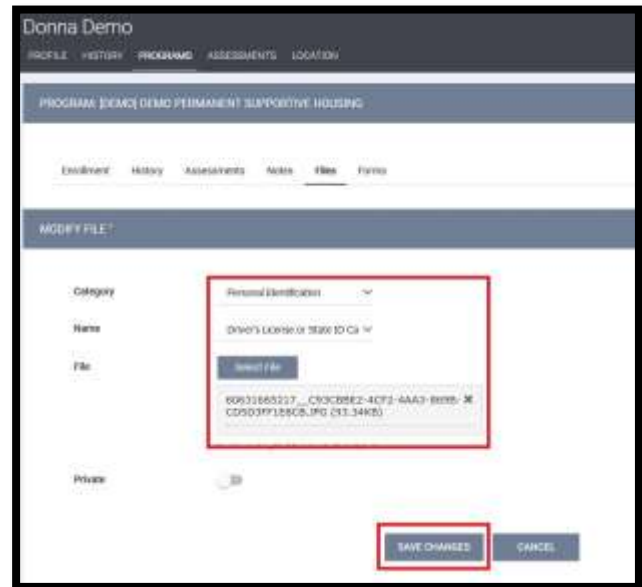
To open the file, click on the title of the document. Depending on the file type, it will open or download to your computer.

Speak with your supervisor to know your agency's policies on what files should be added to Clarity.

Forms are another useful Clarity feature. Most projects have the "Client Revocation of Consent" form. Some projects also have custom forms created by STEH HMIS Support.

Forms are custom documents created within Clarity that the client can review and sign similar to the digital "Release of Information" form. Documents can be signed with a mouse or touchscreen. Some forms also contain yes/no toggles which can be useful when used as a checklist, for example.

To add a form:

1. From the client's Profile click on Programs tab and then click on the edit icon next to the appropriate program.
2. Click on the Forms tab.
3. Select "Add Form."
4. Choose the form from the Forms option list and click ADD.
5. Review and complete the form as needed.
6. If the form requires a client signature:
   - Ask the client to sign using a mouse or touchscreen.
   - Click the Apply button next to the signature.
7. Click "Save."
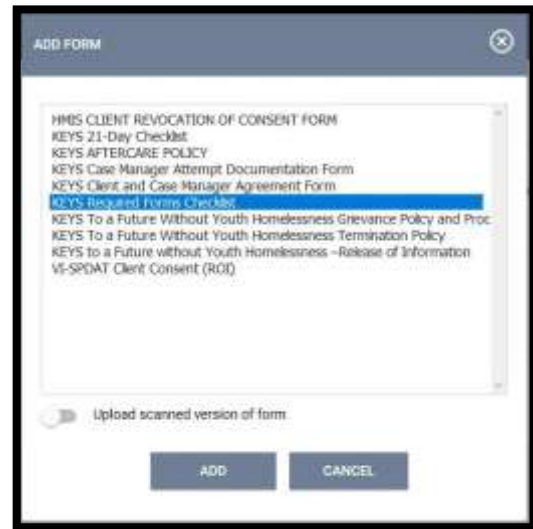
You can also upload a scanned version versus using the digital version included in Clarity. To upload a scanned version of the form:

1. Click on the "Add Form" button from the program level "Forms" tab.
2. Toggle on "Upload scanned version" and click the "ADD" button.
3. Click the "Select File" button and navigate to the scanned document on your computer or hard drive.
4. Select "open" then click "Save."

Please note: if a client signs a revocation of consent form you must also set that client record to private. If the record cannot be set to private contact HMISsupport@end-homelessness.org.

Assessments

Assessments are the area in Clarity where all custom screens are available, as well as certain HUD required or community required updates and assessments. Custom screens may include rental updates, housing Inspection screens, acuity tools, Arizona Self-Sufficiency Matrix (ASSM), Case Plans, VI-SPDAT, and more.

Different custom screens are available from the Client level and Program level Assessments tabs. Please speak with your supervisor to learn more about custom screens which may be required by your programs.

Completing and Assessment

Navigate to the client or program level 'Assessments' tab to access Assessments, HUD required updates, or custom screens go to the client or program level Assessment tabs. Note: different screens will be available from the Client level (Financial request forms, HCV Referral forms, and pre-enrollment assessments such as the "Diversion Conversation") than from the Program level 'Assessment' tab (HUD required updates, program related assessments, rental details, etc).

1. From the appropriate 'Assessments' tab click the 'Start' button next to the desired screen. Toggle on any family members as appropriate/available.
2. Enter the required data. In some cases, the screen will populate with data entered on a pervious assessment. In these cases, update any data that has changed.
3. Hit 'Save' or 'Save and Next'.
4. If family members were toggled on the system will walk you through each family member's screen.
5. You can view completed assessments from the Assessment History located on the Assessment tab under available assessments/screens.

HUD Required Assessments

Annual assessments

Annual Assessments, also known as Housing Recertification, are required for all clients enrolled in programs for the duration of one year or longer. This assessment must be completed 30 days before or 30 days after the anniversary of the client's Project Start Date. When working with a household, the annual assessment must be completed for ALL household members based on the Head of Household project start date.

The most recent data entered about a client from the Enrollment, Status Update, or previous Annual Assessment will pre-populate into the Annual Assessment. This way you only need to update information that has changed. The Annual Assessment must be completed regardless of whether or not there have been any changes since the project start, last annual assessment, or latest status update assessment.

Important: In order to be reportable to HUD, the annual assessment must be completed within the 60-day-window around the client's (or Head of Household's) program start date.

Status Update Assessments

Status Update Assessments are HUD required documentation to be submitted whenever there is a change in a client's financial, health, or situation. Status Update Assessments are vital in tracking and reporting project outcomes. If a client's situation changes and Annual Assessment is not yet due, the changes should be documented in the Status Update Assessment.

The following situational changes are tracked through Annual Assessments and Status Updates:

- Income
- Disabling conditions and barriers
- Domestic violence
- Non-cash benefits
- Health Insurance
- Health Status
- Employment Status

Current Living Situation

Current Living Situation (CLS) is a set of required data collected from adult or child Head of Households enrolled in Street Outreach, Night-by-Night Emergency Shelter, Coordinated Entry, Supportive Services, or YHDP programs.

A CLS must be created for each street outreach encounter. The CLS is critical in determining if a client currently meets HUD's definition for literally homeless and, therefore, is eligible for many CoC housing programs. All other program types required to collect CLS should enter a new CLS any time the client's current living situation changes (for example, moving from shelter to housing or the street).

Access Assessments in the assessments tab within the program level navigation. Select "Start" next to the assessment you would like to complete. Toggle on all household members (if applicable). Update any information that has changed for the client (if this is an Annual Assessment and nothing has changed, you must still go through the steps.)

Click "Save & Close" an individual or "Save & Next" if working with a household. If this is a household, Clarity will move through the additional member's assessment screens until each member has been completed.

Check out these more detailed articles in the Cincinnati/Hamilton County HMIS Knowledgebase:
Assessments and Custom Screens : (freshdesk.com)

Program Exits

All clients must be properly exited upon completion from the program.
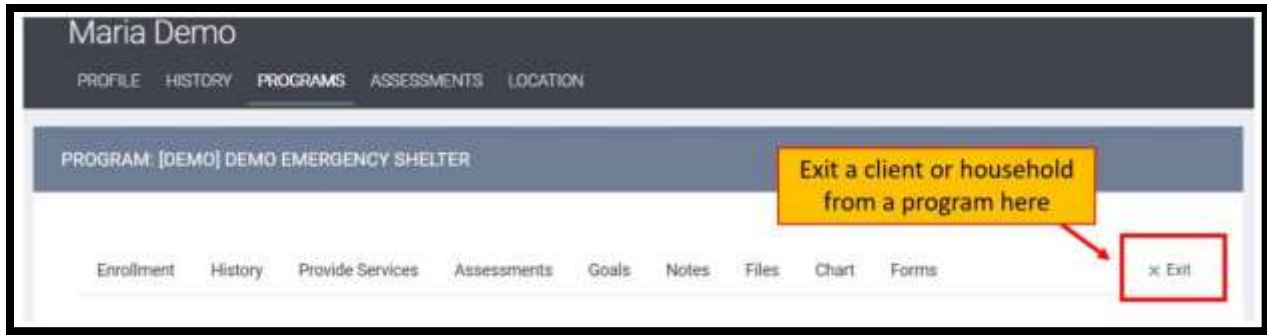
From the programs or history tab in a client record, select the edit icon next to the program you wish to exit the client from. Click on the "X Exit" text on the right of the program level navigation. If working with a household, you will have the ability to select all relevant members also exiting the program.

Select which client(s) are exiting the program, then click "End Program."

Complete and or update all data fields on the End Program screen.

Similar to program enrollment, program exits also have required universal data elements:

Universal Program Data Elements (Program Exit)	
Project Exit Date (3.11)	This data is used to track a client's period of participation within a program with the month, day, and year of the start and exit from the program.
Destination (3.12)	Recorded to identify where a client will stay for the purposes of outcome measures. Please note: For a complete list of destinations and living situation responses, please see Appendix A of the HMIS Data Standards Manual.

 Select "Save & Close" or "Save & Next" if working with a household.

Please note, services cannot be added to an enrollment after a client has been exited from the program. It is possible to undo a program exit by deleting the program exit date and selecting "Save & Close."

How do I remove a program Exit?

Sometimes a client or household has been exited from a program by mistake, and the user needs to reverse the exit to reactivate the program enrollment.

Note: This is not the same as a client returning to a program after completion. That requires a new program enrollment.

- From the client profile page, click on the Programs Tab, then click on the 'Edit' button next to the program with the incorrect exit.
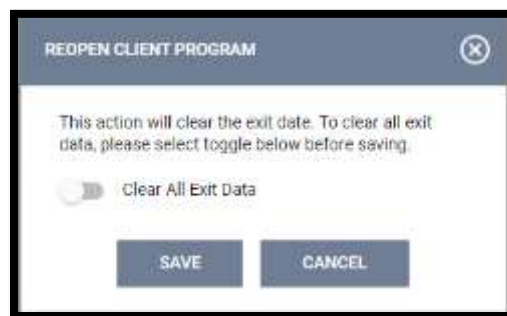
- Click on the 'Exit' button to the right.

- Scroll to the bottom of the page and click on the button that says 'Reopen Client Program'.

- You will then be asked if you want to delete all exit data. If the client's exit was a mistake and the client is still active in the project, you will want to make sure this is selected. If you need to reopen a client's enrollment to add something missing, such a service, you will want to make sure this is not selected. You will then click on 'Save'.

- After clicking 'Save', a pop-up will ask you to confirm if you want to remove the exit date.

cincinnati.clarityhs.com says

By confirming, the exit date for this client will be removed. This action will not modify any client service end dates.

OK   Cancel
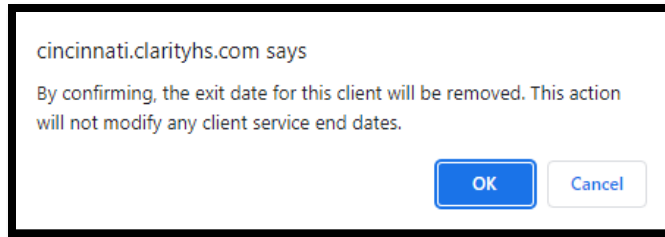
Check out these more detailed articles: Reversing a Program Exit : (freshdesk.com) and How Do I Remove a Program Exit? (bitfocus.com)

Reports

Click on the Report icon in the launcher to access a variety of reports in Clarity. You may have access to three reporting tabs in the reports section of Clarity depending on your user access level.

- Report Library – This tab includes reports that are built by Bitfocus and cannot be edited or changed by STEH HMIS Staff. All required HUD reports are available from the Report Library.
- Explore – The Explore tab offers an embedded version of the Clarity Looker tool so users can create custom reports and analyze their project's data.
- Data Analysis – This tab provides access to saved custom reports. Reports available under Cincinnati Clarity System Report were built by the STEH HMIS Team to help users access data about their programs. Reports available under the "AGENCY Name" Reports include reports that might have been built by STEH HMIS specifically for your agency or reports built and saved by your agency staff.

The Report Library

Reports in the Report Library are organized into sections according to report type. Click on the down arrow to view reports within each category.

To run the report immediately, click "Run." Click "Schedule" to run it at a later time. Click "More Info" to view a description of that particular report.

Choosing either "Run" or "Schedule" directs you to the preview tab where you can select the appropriate parameters for the report. Since each report is different, the options will differ as well.

Report output formats will also vary depending on the report you are running. The main report output options include:

- Web Page (allows you to drill down into the data and inspect the underlying client level data)
- PDF (useful for downloading and saving as PDF format types cannot be edited without special software)
- Excel (useful for downloading if you need to sort, filter, edit, etc. Functions as any other spreadsheet)

After choosing your parameters, click "Submit." A "Report Queue Manager" popup box will appear showing your report is being processed. Once the report is complete, another popup box appears letting you know the report is ready. Click "Open" on the second popup box to read the report. Alternatively, you can open the report from the report notification button next to the launcher.

For more information on report parameters, see this article: Common Report Parameters : (freshdesk.com)

Click on the report queue manager (the small box with the number) next to the launcher, then clicking "Open" next to the report name. The report will be available in the report queue manager for 8 – 10 hours. You can also delete the report by clicking on the trashcan icon. Note: if you run the same report twice the second report will overwrite the first. If you need two versions of the same report but with different reporting parameters (for example, different report data ranges), you should download the first version before running the second version.

The Explore Tab

The Explore Tab hold allows users to:

- **Explore Client, Program, and Agency Data for further analysis and insights** - Clarity has an embedded data analysis software called "Looker" that allows users explore data much more thoroughly than the existing reports found in the Client Level Reports or Report Library
- **Create, save, and share customized reports (or Looks)** - most HMIS users have access to this feature and can save looks to the Data Analysis tab for future reference and use.

There are eight different models available in the Explore tab. We recommend starting with the **HMIS Performance Model**. Select "Run" next to the desired model.

For more information on each model, please review this article: Looker Data Models - Overview – Bitfocus (clarityhs.help).

The Explore Tab has four sections:

1. The Search/Field Pane - This is an extensive list of data entered into Clarity that can either be added to the data pane or used as a filter (or both!). It is highly recommend that users familiarize themselves with the categories and options available prior to starting on a new report. The field pane items can be divided into two main categories:
    a. Dimensions
    b. Measures
        Search/Field Pane Icons: (corresponding with the image below) Pivot, Filter, More information, More Options
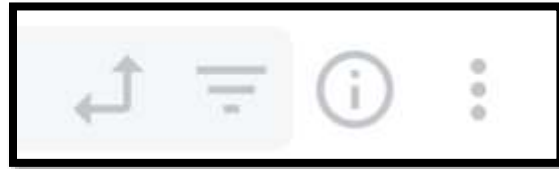
2. The Filter Pane - This is where different filter categories can be modified to analyze specific data. For example, you can look at a specific time period, only clients who identify as Veterans, only clients enrolled in certain programs, etc. Any of the dimensions can be used as filters.
3. Visualizations - This is an advanced feature that allows the data field to be represented visually. There must be at least one dimension and one measure.
4. The Data Pane - This is where the data is displayed in a table format. Within the Data Pane, there are various options to modify the data.
    a. Click and drag column headers to rearrange.
    b. Click on the column header to ascend or descend the data. Hold down the Ctrl key to select multiple headers.
    c. In the gear icon (corresponding with image below), users can remove the dimension/measure, make the selected into a filter, pivot the selected, group with other data, hide from the visualization, and copy values.
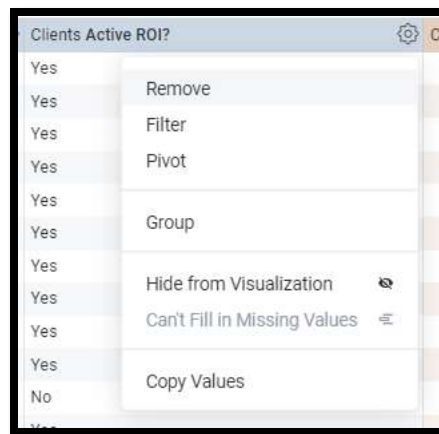
When adding or modifying data or filters, always select "Run" in the top right corner to update the data.

To save a Look, select the purple "Save Look" button. Create a unique title. This will save the look to the Data Analysis tab under your Agency Reports section. **Do not use the schedule or save look option in

the gear icon - this does not function properly. If you would like to have a report scheduled, please contact the HMIS Support Team for assistance.

The Data Analysis Tab

The Data Analysis Tab holds reports in two sections:

1. Cincinnati Clarity System Reports - these reports and dashboards are created by the STEH HMIS Support Team to meet the needs of Agencies and programs that the HUD/Bitfocus built reports in the Report Library do not address. All HMIS users have access to these reports.
2. "Demo Agency" Reports - this will be the name of the Agency you are logged in under. These reports and dashboards are created by HMIS users or Agencies and only users who have access to that agency can access those reports.

Please note: Because these reports and dashboards vary Agency to Agency, please speak with you supervisor or HMIS Lead for more information or guidance on which report to use. If you would like to request a custom report or dashboard, please reach out to HMIS Support.

Using Filters - Existing reports in the Data Analysis Tab have pre-set filters that can be adjusted to view different sets of data. The default filter settings might not be applicable to your inquiry. It is important to note that the data viewable depends on the data the user has access to. For example, if a user has access to "Agency A" and "Demo Agency," data will pull from both agencies in most cases.

To view and/or adjust a filter click on the down arrow next to "Filters."

To view more detailed information on the most common Dashboard filters, please view this article: Common Data Analysis and Dashboard Filters : (freshdesk.com)

Please note that any time a filter is modified, you must select "RUN" in the top right to refresh the data shown in the report/dashboard.

Referrals

Users have the ability to make referrals within Clarity. Please see the Coordinated Entry & Exit folder to see more information about making referrals including:

- o VI-SPDAT
- o Veterans by Name Lisa
- o Shelter Diversion
- o Housing Choice Voucher
- o Emergency Housing Voucher

Access/ability to make and/or receive referrals in Clarity require special access. Please contact HMIS Support to request access.

> To view more detailed information on making referrals in Clarity, see the articles in this HMIS Support Knowledge Base folder: Coordinated Entry & Exit / VI-SPDAT : (freshdesk.com)

Key Terms and Acronyms

Term	Acronym (if applicable)	Definition
Agency		An organization that serves homeless and form, including nonprofit homeless providers, victim service providers, faith-based organizations, governments, businesses, advocates, public housing agencies, school districts, social service providers, mental health agencies, hospitals, universities, affordable housing developers, and law enforcement, and organizations that serve homeless and formerly homeless persons
Annual Performance Report	APR	The Annual Performance Report (APR) is required for all organization receiving HUD funding or grants. It is submitted to HUD electronically every operating year with data collected within Homeless Management Information System (HMIS).
Continuum of Care	CoC	Planning body charged with guiding the local response to homelessness.
Emergency Solutions Grant	ESG	The ESG program provides funding to: (1) engage homeless individuals and families living on the street; (2) improve the number and quality of emergency shelters for homeless individuals and families; (3) help operate these shelters; (4) provide essential services to shelter residents, (5) rapidly rehouse homeless individuals and families, and (6) prevent families/individuals from becoming homeless.
Housing Inventory Count	HIC	The HIC is where all residential projects (both HMIS participating and non-participating) specify the number of beds and units available to homeless persons within a jurisdiction.
Homeless Management Information System	HMIS	A data system that meets HUD's HMIS requirements and is used to measure homelessness and the effectiveness of related service delivery systems. The HMIS is also the primary reporting tool for HUD homeless service grants as well as for other public streams of funding related to homelessness.

HMIS Lead		A representative at an Agency designated by CoC to administer and manage the HMIS at the Agency level.
Head of Household	HOH	An individual who is designated at the main point of contact for a family, household, or group. The Global HOH may not correspond with a program HOH.
Housing Opportunities for Persons with AIDS	HOPWA	HOPWA provides housing assistance and related supportive services for persons with HIV/AIDS, and family members who are homeless or at risk of homelessness. This project has different project reporting requirements than the other HUD funded projects in this document.
Personal Identifiable Information	PII	Information that can is unique to each client and can be used to identify them. This information includes name, date of birth, and Social Security Number.
Point in Time Count	PIT	An annual count, usually in the last week in January that is required for all CoCs. Every other year, the PIT Count must include an "unsheltered" or street count.
Projects for Assistance in Transition from Homelessness	PATH	PATH is funded by the Substance Abuse and Mental Health Services Administration (SAMHSA). It provides services to mentally ill homeless people, primarily through street outreach, to link them to permanent community housing. This project has different reporting requirements than HUD funded projects and uses HMIS to collect this information.
Project Types		HUD defines 12 Project Types in HMIS: **Homelessness Prevention** - A project that offers services and/or financial assistance necessary to prevent a person from moving into an emergency shelter or place not meant for human habitation. **Street Outreach** - A project that offers services necessary to reach out to unsheltered homeless people, connect them with emergency shelter, housing, or critical services, and provide urgent, non-facility-based care to unsheltered homeless people who are unwilling or unable to access emergency shelter, housing, or an appropriate health facility. Only persons who are "street homeless" should be entered into a street outreach project. Projects that also serve persons other than "street homeless" must have two separate projects to be set up in an HMIS – one 'Street Outreach' and the other 'Services Only.' **Emergency Shelter** - A project that offers temporary shelter (lodging) for the homeless in general or for specific populations of the homeless. Requirements and limitations may vary by program, and will be specified by the funder. **Day Shelter** - A project that offers daytime facilities and services (no lodging) for persons who are homeless.

Transitional Housing - A project that provides temporary lodging and is designed to facilitate the movement of homeless individuals and families into permanent housing within a specified period of time, but no longer than 24 months. Requirements and limitations may vary by program, and will be specified by the funder.

Safe Haven - A project that offers supportive housing that (1) serves hard to reach homeless persons with severe mental illness who came from the streets and have been unwilling or unable to participate in supportive services; (2) provides 24-hour residence for eligible persons for an unspecified period; (3) has an overnight capacity limited to 25 or fewer persons; and (4) provides low demand services and referrals for the residents.

RRH - Rapid Re-Housing - A permanent housing project that provides housing relocation and stabilization services and short- and/or medium-term rental assistance as necessary to help a homeless individual or family move as quickly as possible into permanent housing and achieve stability in that housing.

PSH - Permanent Supportive Housing (disability required for entry) - A project that offers permanent housing and supportive services to assist homeless persons with a disability (individuals with disabilities or families in which one adult or child has a disability) to live independently.

PH – Housing with Services (no disability required for entry) - A project that offers permanent housing and supportive services to assist homeless persons to live independently, but does not limit eligibility to individuals with disabilities or families in which one adult or child has a disability.

PH - Housing Only - A project that offers permanent housing for persons who are homeless, but does not make supportive services available as part of the project.

Coordinated Assessment - A project that administers the continuum's centralized or coordinated process to coordinate assessment and referral of individuals and families seeking housing or services, including use of a comprehensive and standardized assessment tool.

Services Only - A project that offers only stand-alone supportive services (other than outreach) to address the special needs of participants (such as child care, employment assistance, and transportation services) and has associated housing outcomes.

		Other - A project that offers services, but does not provide lodging, and cannot otherwise be categorized as another project type, per above. Any project that provides only stand-alone supportive services (other than outreach) and has no associated housing outcomes should be typed as 'Other.' For example, a project funded to provide child care for persons in permanent housing or a dental care project funded to serve homeless clients should be typed 'Other.' A project funded to provide ongoing case management with associated housing outcomes should be typed 'Services Only.'

Accessing Additional Resources and Contacting HMIS Support

If you have questions about Clarity HMIS, or wish to offer suggestions or feedback on how STEH can improve our services to you and to our community, please contact us: HMISSupport@end-homelessness.org or 513-263-2790 9:00am – 3:00pm Monday through Friday (excluding holidays)

STEH HMIS Knowledgebase: http://steh.freshdesk.com
STEH HMIS Training Portal: http://steh.talentlms.com

A Note about Personal Identifiable Information:
When contacting HMIS Support, please do not include any Personal Identifiable Information (PII) such as social security numbers, birth dates, etc. Identify the individual(s) with Clarity Unique Identifier found on the Clarity client's profile page. If transmitting PII is unavoidable, use the secure messaging system within Clarity.