

Housing Provider HMIS User Manual

WA-500 Seattle/King County CoC

About this Resource



The purpose of this document is to provide users with step-by-step guidance on how to engage with Clarity Inventory. Please use the table of content to direct you to specific topics of interest.



Other Helpful Resources

- Visit the [Training Guides & Tools](#) Page of the HMIS Support Website
- Reach out to the Help Desk for Technical Assistance (206) 444-4001, Ext 2 | kcsupport@bitfocus.com | Chat widget directly in Clarity
- Stay apprised HMIS Inventory Events that may be occurring: kingcounty.bitfocus.com/kc-events

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Edit Building Attributes

When would you do this?

You will edit building attributes when changes to the following occur:

1. Operating Hours
2. Transit Accessibility & Parking
3. Building Features & Accessibility
 - a. Uses of Communal Bathrooms
 - b. WiFi Availability
 - c. Laundry Facilities
4. Building Policy
 - a. Pets Allowed
 - b. Guests Allowed
5. Sobriety Policy
6. Max Lengths of Stay
7. Other Residential Policies
8. Eligibility Criteria
 - a. Sex Offender Screening Policies
9. On-Site Medical Services
10. Other On-Site Services
 - a. Housing Navigation
 - b. Case Management
 - c. Employment
11. Meals & Food Provided
12. Storage Availability
13. Building CE Participation

Understanding Building CE Participation Attribute

All Units Participate in CE

You must select “*All units participate in CE*” for the Building CE Participation attribute if the entire building receives referrals from Coordinated Entry only.

- When “*All units participate in CE*” is selected at the building level, unit CE participation is assumed, and you do not have to specify this specific component at the unit level.

Some Units Participate in CE

You must select “*Some units participate in CE*” for the Building CE Participation attribute if only some building units receive referrals from Coordinated Entry.

- When “*Some units participate in CE*” is selected at the building level, specific unit participation must be identified within the unit attribute “Referral Pathway-Housing.” Review how to update Unit Attributes below.

No Units Participate in CE

You must select “*No units participate in CE*” for the Building CE Participation attribute if no units receive referrals from Coordinated Entry.

- When “*No units participate in CE*” is selected at the building level, unit non-participation is assumed, and you do not have to specify this attribute at the unit level.

Important Reminders:

1. This designation must align with funder requirements. The default selection in Clarity for the Building CE Participation attribute is “Select.” You must make sure the Building CE Participation is accurate.
2. **For Rapid Re-Housing and Scattered Site Programs:** These programs do not have Buildings so CE participation must be indicated on the unit level.

How to Update Building Attributes

1. Your user access role must have the ability to “Edit Sites - Administrative and Housing Inventory Entities” enabled.
 - a. If you don't see “Manage” in your launchpad and/or the Sites tab, your agency lead needs to request this access from the Help Desk.

The screenshot displays the Housing Provider HMIS system interface. At the top, a notification banner reads: "IT'S A GREAT DAY FOR TRAINING!!! IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this system MUST be fictitious for security purposes." Below this, the "Clients" section is visible, featuring a search bar and a table of recently accessed clients. A red box highlights the "Manage" button in the left sidebar. The table lists five clients with their details, including DOB, SSN, Household Members, and Updated by. Below the Clients section, the "SITES" tab is selected, showing a list of "Housing Inventory Sites" with columns for Site Name, Address, and Status. A red box highlights the "SITES" tab in the top navigation bar. The right sidebar shows site statistics: 11 Active enrollments, 1 Status due, 0 Case manager, and 0 Navigator.

Client	DOB	SSN	Household Members	Updated by
Test, I Am A (They/Them/Theirs) E0622F260	9/1/95 Age: 30	# 4444	Individual client No household members	Lauryn Searles System - Do Not Remove
Test, Minor AE0A4BE11	1/1/10 Age: 16	# 5556	Individual client No household members	Lauryn Searles System - Do Not Remove
Test, Alison D30988830	1/1/86 Age: 40	# 0000	Individual client No household members	Alison Wilson System - Do Not Remove
Horizon, Harry 5BE4C84AB	1/1/88 Age: 38	# 3456	Individual client No household members	Lauryn Searles System - Do Not Remove
Baby, Test E55970009	1/1/15 Age: 11	# 2222	Individual client No household members	Admin Admin System - Do Not Remove

KC Test Agency

SITES DATA ANALYSIS

SITES ADD NEW SITE +

Housing Inventory Sites

Site Name Address Status

Site Categories

- Administrative
- Housing Inventory

2. After navigating to Manage>Sites, you will select “Housing Inventory” under Site Categories. From there you can Edit any of your agencies sites. Buildings are contained within Sites.

a. Please note, RRH programs do not have buildings - they only have Unit “Slots.”

SITES

Housing Inventory Sites

Site Name	Address	Status
King County Housing	1911 30th Ave S, Seattle, WA, 98144-4864	Active
King County Shelter	157 S Jackson St, Seattle, WA, 98104-2852	Active
Seattle Harbor PSH	100 S King St, Seattle, WA, 98104-3844	Active

Site Categories

- Administrative
- Housing Inventory**

MODIFY BUILDING

Building Name King County PSH

Start Date 01/01/2023

Status Active

3. Navigate to Buildings & Units where you will be able to edit Building Attributes.

KING COUNTY HOUSING: BUILDINGS

Building Name	Description	Status
King County PSH		Active

Site Resources

- Overview
- Programs & Projects 1
- Buildings & Units 1**
- Funding Sources 0

Managed with Clarity Human Services

Edit Unit Attributes

When would you do this?

You will edit unit attributes when changes to the following occur:

1. The Referral Pathway (If Unit Specific)
2. ADA and Other Unit-Specific Features
3. Focus Population
4. Eligibility Criteria
 - a. Income Level Restrictions
 - b. Household Sizes
 - c. Demographics

Please note: The default selection in Clarity for the unit “Referral Pathway” attribute is “Select.” You must make sure the unit’s Referral Pathway is updated when a building has a blend of CE and Non-CE units.

Understanding the Unit Referral Pathway Attribute Referral Pathway – Housing/ Shelter

You must select “*Coordinated Entry System*” for the specific units that receive referrals from Coordinated Entry when the Building CE Participation is “*Some units participate in CE.*”

- When “*When some units participate in CE*” is selected at the building level, the Coordinated Entry team will only know the specific units to refer to when “*Coordinated Entry System*” is selected as a Referral Pathway for the unit.

How to Update Unit Attributes

1. Once you are in the Building (or Site for RRH Programs) that holds the Units you’d like to update, you will select “Units” underneath Building Resources.

The screenshot displays the 'MODIFY BUILDING' interface. On the left, a form contains fields for 'Building Name' (King County PSH), 'Start Date' (01/01/2023), 'Status' (Active), and 'Description'. On the right, a sidebar titled 'Building Resources' lists several categories: 'Overview', 'Programs & Projects' (1), 'Funding Sources' (0), 'Unit Configuration Type' (1), and 'Units' (8). The 'Units' option is highlighted with a red rectangular box.

2. Select the Edit icon of the unit you’d like to update where you will be able to update Unit Attributes.

UNITS

	Unit Name	Unit Configuration Type	Beds	Availability	
Edit	Unit 101	PSH - Adult - 1 BR	1	Available	▼
	Unit 102	PSH - Adult - 1 BR	1	Available	▼

MODIFY UNIT

Unit Name

Unit 101

Unit Start Date

01/01/2023

25

Status

Active ▼

Status Start Date

01/01/2023 12:00 AM

Status End Date

/ / : AM

Edit Unit Status From the Inventory Map

When would you do this?

You will edit a unit's status if an active unit needs to be taken offline or if an offline unit needs to become active.

Understanding Active to Offline Unit Status

You would change a unit's status from active to offline for the following reasons:

1. Cleaning
2. Maintenance
3. Held for Mobility Transfer
 - a. Unit is being held for a mobility transfer from CE
4. Held for Internal Transfer
 - a. Unit is being held for an internal transfer within the agency
5. Staffing Capacity
 - a. Program is at capacity and cannot fill units
6. Bed Bugs
7. Meth or Drug Remediation
8. Fire Damage
9. Flood Damage
10. Isolation and Quarantine
11. Shelter Relocation
 - a. Shelter is moving locations
12. RRH Offline
 - a. Use this option for RRH extra slots as capacity shifts

Understanding Offline to Active Unit Status

You would change a unit status from offline to active for the following reasons:

1. You need to end an auto Offline status early
2. You need to end a manually set Offline status.

Important Reminders:

1. When a client exits from an enrollment, the associated unit immediately becomes available for referral unless you manually change the unit status to Offline, except for PSH programs.
2. **For PSH Programs:** Units automatically turn Offline for 7 days for cleaning and maintenance. However, you can end this Offline status early or keep the unit Offline for longer should you need. Please update the Offline Reason as appropriate.
3. You should never use an Inactive status. If you need to take a unit completely offline indefinitely, you will submit a [Project Change Request](#).

How to Edit a Unit Status from the Inventory Map

1. Your user access role must have the following access rights enabled:
 - a. Inventory – Add Bed/Unit Status
 - b. Inventory – Edit Bed/Unit Status

2. Navigating to the Inventory Map

IT'S A GREAT DAY FOR TRAINING!!!
IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this system MUST be fictitious for security purposes.

Clients

Search for a client

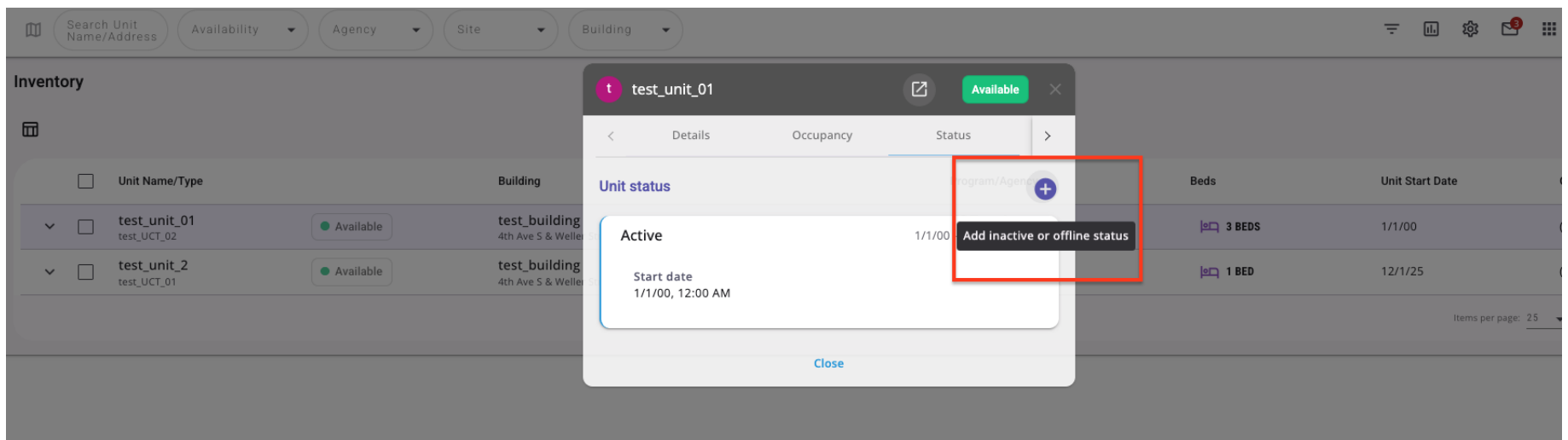
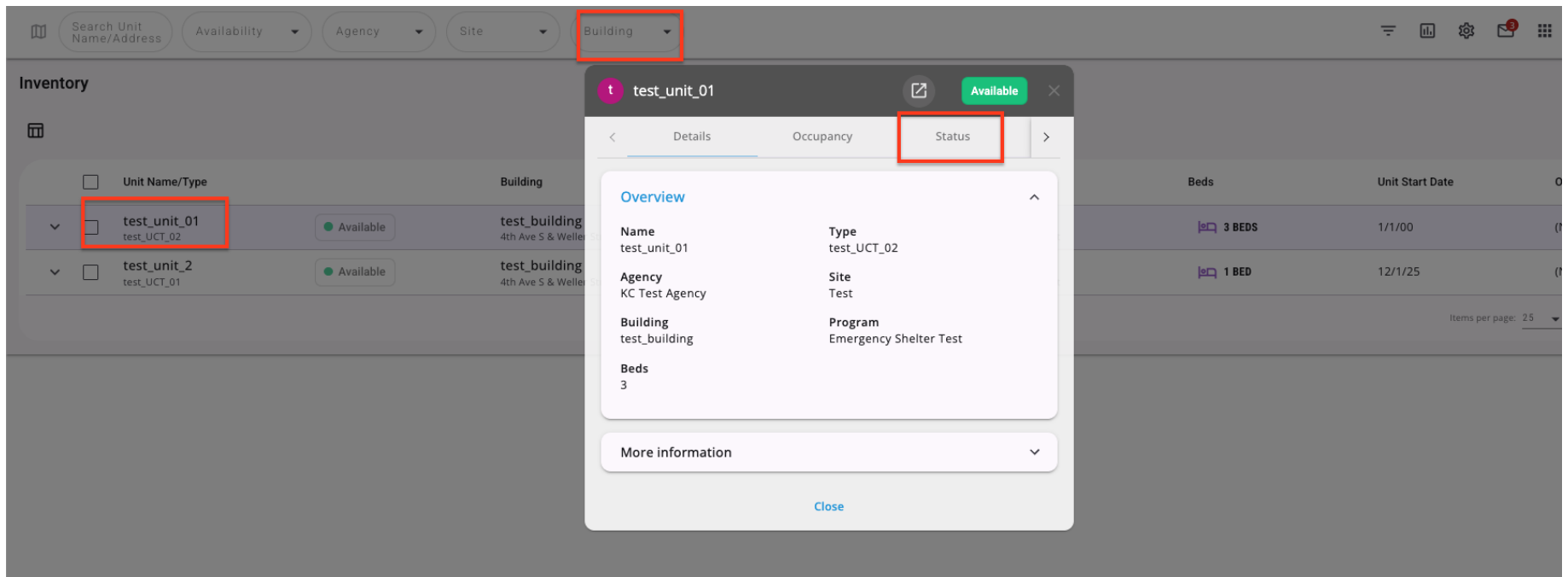
Showing recently accessed clients. Use the search bar above to find other clients.

Client	DOB	SSN	Household Members	Updated by
TI Test, I Am A (They/Them/Theirs) E0622F260	9/1/95 Age: 30	# 4444	Individual client No household members	LS Lauryn Searles System - Do Not Remove
TM Test, Minor AE0A4BE11	1/1/10 Age: 16	# 5556	Individual client No household members	LS Lauryn Searles System - Do Not Remove
TA Test, Alison D30988830	1/1/86 Age: 40	# 0000	Individual client No household members	AW Alison Wilson System - Do Not Remove
HH Horizon, Harry SBE4C84AB	1/1/88 Age: 38	# 3456	Individual client No household members	LS Lauryn Searles System - Do Not Remove

Summary Cards:

- 11 Active enrollments
- 1 Status due
- 0 Case manager
- 0 Navigator

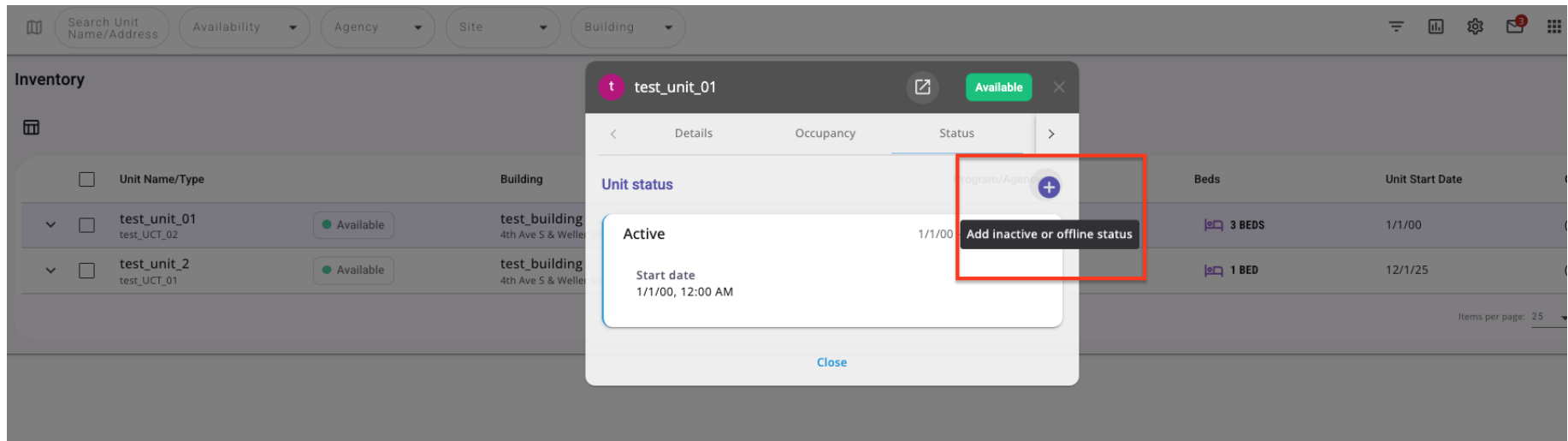
3. Identify the building/unit you wish to edit the status of and navigate to the status tab of the Unit card.



- a. If you do not see an “Add” symbol and/or an “Edit” icon for Offline Status’, you need to have your agency lead request this access from the Help Desk.

How to Change a Unit Status from Active to Offline

1. From the unit card, navigate to the status tab and select the add icon
2. Select the status of "Offline," select the Offline Reason
3. Write an Offline description and select the date the offline status begins.
 - a. Offline start date can be in the past, present or future.
4. Indicate an end date to the Offline status if this is known
 - a. Offline end date can be in the past, present, or future.



The screenshot shows a software interface for managing unit inventory. A modal window titled 'test_unit_01' is open, displaying a 'New status' form. The form has several fields, each highlighted with a red rectangle: a 'Status' dropdown menu set to 'Offline', an 'Offline reason' dropdown menu set to 'Cleaning', an 'Offline description' text area containing 'This unit is Offline for Cleaning.', a 'Start date' field set to '6/2/2026', a 'Start time' field set to '01 : 15 PM', an 'End date' field, and an 'End time' field. Below these fields are 'Cancel' and 'Save' buttons, with the 'Save' button also highlighted by a red rectangle. The background shows a table with unit information, including 'test_unit_01' and 'test_unit_2', both marked as 'Available'.

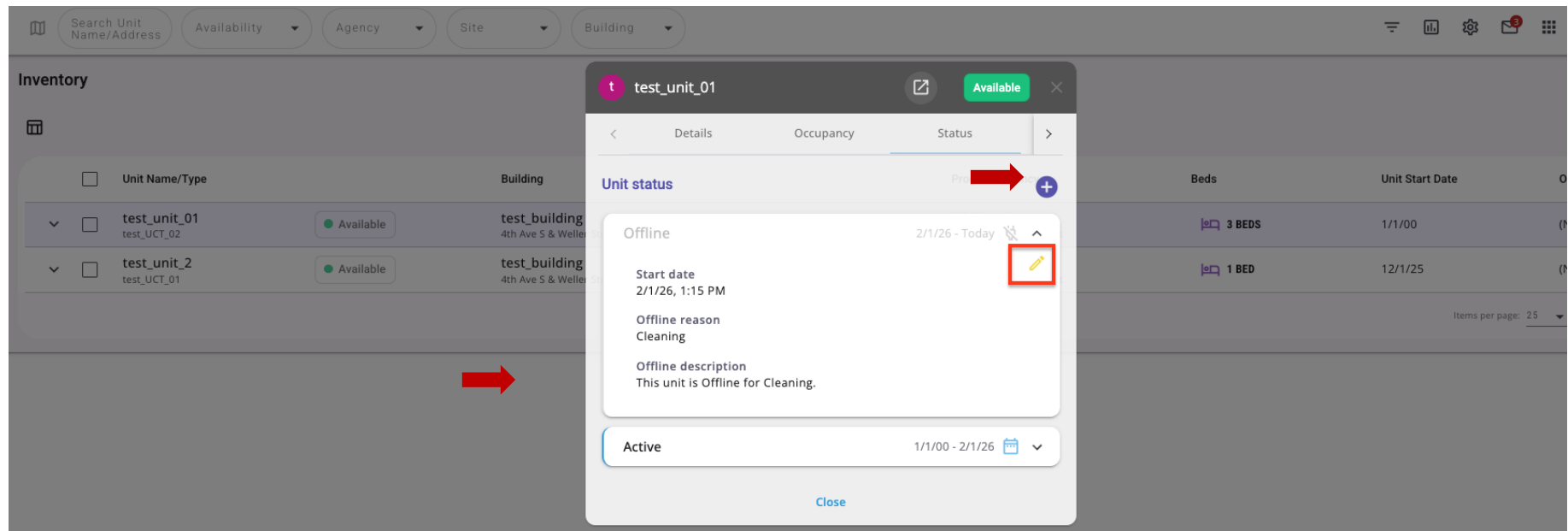
Unit Name/Type	Building
test_unit_01 test_UCT_02	test_building 4th Ave S & Welle
test_unit_2 test_UCT_01	test_building 4th Ave S & Welle

Beds	Unit Start Date
3 BEDS	1/1/00
1 BED	12/1/25

For PSH Programs: Units automatically turn Offline for 7 days for cleaning and maintenance. However, you can end this Offline status early or keep the unit Offline for longer should you need. Please update the Offline Reason as appropriate.

How to Change a Unit Status from Offline to Active

1. From the unit card, navigate to the status tab.
2. Select the dropdown arrow to the right of the current Offline Status and select the “Edit icon.”
3. Enter in the date and time you would like the unit’s Offline Status to end and press Save.
 - a. Offline start date can be in the past, present or future.
4. Confirm the Offline End Date.
5. You can view a unit’s status history under the status tab.



Inventory

Search Unit Name/Address Availability Agency Site Building

Unit Name/Type	Building	Status
test_unit_01 test_UCT_02	test_building 4th Ave S & Welle	Available
test_unit_2 test_UCT_01	test_building 4th Ave S & Welle	Available

test_unit_01 Available

Details Occupancy Status

Unit status Program/Agency

Offline 2/1/26 - 6/1/26

Status Offline

Offline reason Cleaning

Offline description This unit is Offline for Cleaning.

Start date 2/1/2026 Start time 01 : 15 PM

End date 6/1/2026 End time 12 : 00 AM

Current instance time: 6/2/26, 1:20 PM

Cancel Save

i The Offline End Date is set to 6/1/2026 12:00 AM. This Unit will automatically become Active after the assigned 'Offline' period ends, and an Active status record will be added on 6/1/2026 12:00 AM if there are no future date unit status records that begin on that date.

Back Confirm

test_unit_01 Available

Details Occupancy Status

Unit status Program/Agency

Active 6/1/26 - Today

Offline 2/1/26 - 6/1/26

Active 1/1/00 - 2/1/26

Close

Please note: You cannot “Add” an active status in the same way you can “Add” an Offline Status. You can only end and Offline status which automatically sets the unit as Active.

Update a Unit Configuration Type

When would you do this?

You will update a unit configuration type if the following changes occur

1. The unit is used by a different program
2. The unit increases bed capacity
3. The unit changes the Household Type it serves
4. The unit changes the Population Types it serves, such as:
 - a. Chronically Homeless
 - b. Veterans
 - c. Youth

- d. Non-Dedicated
- e. Gender Specific

Understanding Unit Configuration Types

While you can apply currently active Configuration Types, you cannot create new Unit Configuration Types. There have been many Unit Configuration Types created during the implementation process based on agency/program feedback. Should you determine your program needs a new Unit Configuration Type created, please submit a [Project Change Request](#).

How to Update a Unit Configuration Type

1. Your user access role must have the ability to “Edit Sites - Administrative and Housing Inventory Entities” enabled.
 - a. If you don’t see “Manage” from your launchpad and/or the Sites tab, you need to have your agency lead request this access from the Help Desk.

IT'S A GREAT DAY FOR TRAINING!!!
IMPORTANT: NEVER enter actual client information in this training environment. All data entered in this system MUST be fictitious for security purposes.

Clients

Search for a client

Showing recently accessed clients. Use the search bar above to find other clients.

Client	DOB	SSN	Household Members	Updated by
Test, I Am A (They/Them/Theirs) E0622F260	9/1/95 Age: 30	# 4444	Individual client No household members	LS Lauryn Searles System - Do Not Remove
Test, Minor AE0A4BE11	1/1/10 Age: 16	# 5556	Individual client No household members	LS Lauryn Searles System - Do Not Remove
Test, Alison D30988830	1/1/86 Age: 40	# 0000	Individual client No household members	AW Alison Wilson System - Do Not Remove
Horizon, Harry 5BE4C84AB	1/1/88 Age: 38	# 3456	Individual client No household members	LS Lauryn Searles System - Do Not Remove
Baby, Test E55970009	1/1/15 Age: 11	# 2222	Individual client No household members	AA Admin Admin System - Do Not Remove

11
Active enrollments

1
Status due

0
Case manager

0
Navigator

Manage

2. After navigating to Manage>Sites, you will select “Housing Inventory” under Site Categories. From there you can Edit any of your agencies sites. Buildings are contained within Sites.
 - a. Please note, RRH programs do not have buildings - they only have Unit “Slots.”

SITES

Housing Inventory Sites

Site Name	Address	Status
King County Housing	1911 30th Ave S, Seattle, WA, 98144-4864	Active
King County Shelter	157 S Jackson St, Seattle, WA, 98104-2852	Active
Seattle Harbor PSH	100 S King St, Seattle, WA, 98104-3844	Active

Site Categories

Administrative

Housing Inventory

3. Navigate to Buildings & Units where you will be able to edit the Building.

KING COUNTY HOUSING: BUILDINGS

Building Name	Description	Status
King County PSH		Active

Managed with Clarity Human Services

Site Resources

- Overview
- Programs & Projects 1
- Buildings & Units 1**
- Funding Sources 0

4. Once you are in the Building (or Site for RRH Programs) that holds the Units you'd like to update, you will select "Units" underneath Building Resources.

MODIFY BUILDING

King County PSH

01/01/2023

Active

Description

Building Resources
King County Housing > King County PSH

- Overview
- Programs & Projects 1
- Funding Sources 0
- Unit Configuration Type 1
- Units 8**

5. Select the Edit icon of the unit you'd like to update where you will be able to update Unit.

UNITS				
	Unit Name	Unit Configuration Type	Beds	Availability
	Unit 101	PSH - Adult - 1 BR	1	Available
	Unit 102	PSH - Adult - 1 BR	1	Available

6. Scroll down to the “Unit Configurations” section of the Modify Units page where you will see active Unit Configurations.
7. You will select and drag the new Unit Configuration you would apply to the unit into the “Upcoming Configuration” section and indicate the date you would like this change to occur.
 - a. Unit Configuration start date can be in the past, present, or future.

UNIT CONFIGURATIONS

Current Configuration

Unit Configuration	Beds	Start Date	Note	Program
PSH - Adult - 1 BR	1	01/01/2023		King County PSH Program

Upcoming Configuration:

ASSIGN UNIT CONFIGURATION

As Of Date

SAVE CHANGES

No results

Note

August 2024						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Available Configurations

Unit Configuration	Beds	Note	Program
PSH Adult - 1 BR	3		King County PSH Program



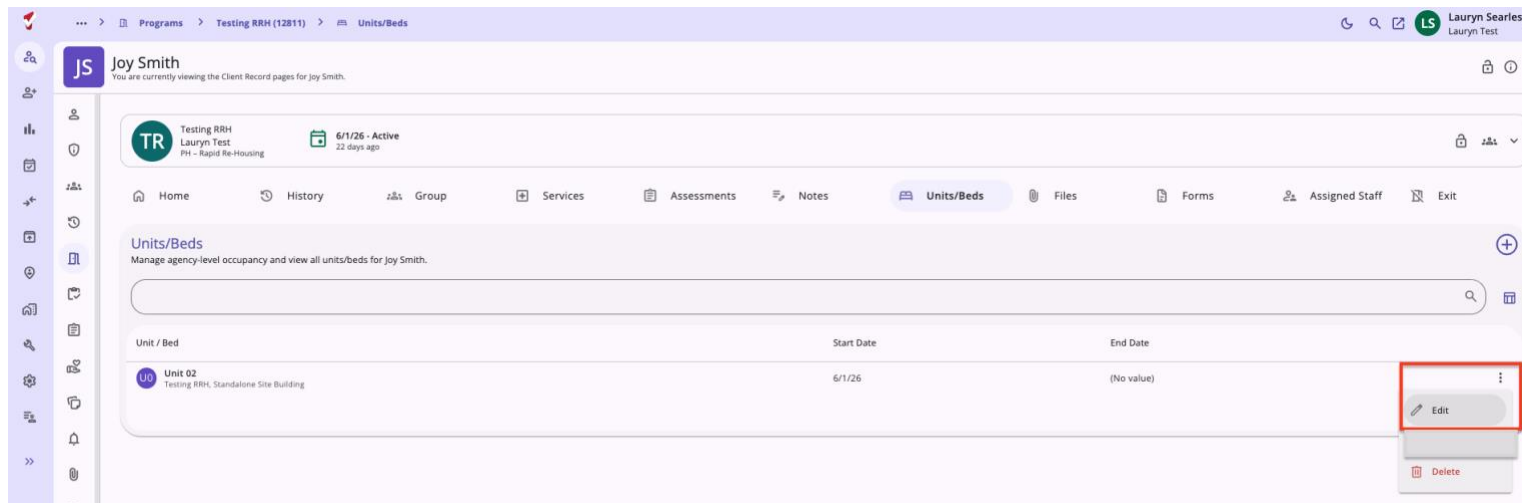
Complete a Unit Transfer

When would you do this?

Clients may need to move to another unit due to reasonable accommodations, safety issues, unit repairs, etc. Follow these steps to transfer a client to another unit.

How to Complete a Unit Transfer

1. From the Program Enrollment, navigate to the Units/Beds Tab.



2. Click edit next to the current unit.

JS Joy Smith
Expand this section to view more details about the client that this program enrollment is for.

Testing RRH
Lauryn Test
PH - Rapid Re-Housing
6/22/26 - Active
1 days ago

Home History Group Services Assessments Notes **Units/Beds** Files

Units/Beds
Manage agency-level occupancy and view all units/beds for Joy Smith.

No results yet!
Results will be displayed here when they are available.

Add a Unit/Bed Occupancy

Unit/Bed Occupancy
Assigning occupancy for Joy Smith

Start Date & Start Time *

06/22/2026 1:15 PM

End Date & End Time

Time

☐ Eligibility Override

☐ Include Partially Available Units

☐ Include Group Members

Available Units / Beds *

Select Unit / Bed

Unit 02 (Testing RRH)1

Cancel Save

3. Add an End Date to the Current Unit.
 - a. The Unit End Date can be in the past, present or future.

Edit Occupancy

Unit/Bed Occupancy

Title
Unit 02
Testing RRH, Standalone Site Building

Start Date & Start Time *

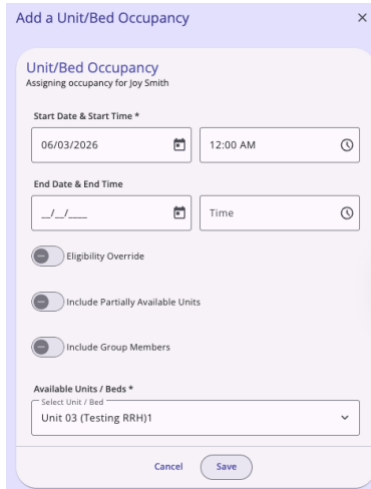
06/01/2026 1:00 PM

End Date & End Time

06/02/2026 12:00 AM

Cancel Save

4. Once you have ended the current Unit Stay, you must assign a New Unit to the Client by selecting “Add Unit/Bed”
5. Assign the Client to the New Unit.
 - a. The Start Date should be the first night the client will sleep in the unit.



The screenshot shows a mobile application interface for adding unit/bed occupancy. The form is titled "Add a Unit/Bed Occupancy" and includes a close button (X). Below the title, it says "Unit/Bed Occupancy" and "Assigning occupancy for Joy Smith". The form has several sections: "Start Date & Start Time" with a date field (06/03/2026) and a time field (12:00 AM); "End Date & End Time" with a date field (MM/DD/YYYY) and a time field (Time); three toggle switches for "Eligibility Override", "Include Partially Available Units", and "Include Group Members"; and an "Available Units / Beds" section with a dropdown menu showing "Unit 03 (Testing RRH)1". At the bottom, there are "Cancel" and "Save" buttons.

Add a Unit/Bed Occupancy X

Unit/Bed Occupancy
Assigning occupancy for Joy Smith

Start Date & Start Time *

06/03/2026 12:00 AM

End Date & End Time

MM/DD/YYYY Time

☐ Eligibility Override

☐ Include Partially Available Units

☐ Include Group Members

Available Units / Beds *

Select Unit / Bed

Unit 03 (Testing RRH)1

Cancel Save