



HMIS End User Manual

King County

Welcome to Clarity Human Services!

On behalf of Bitfocus, Inc., I would like to extend a warm welcome to King County. We are excited to have the opportunity to help your organization make a difference in your community by providing a state-of-the-art Human Services application that is supported by a dedicated staff.

Homeless Management Information System

(888) 866-1533

kcsupport@bitfocus.com



Clarity Human Services has numerous elements that differentiate it from other Human Services systems, one of which being the concept of the user experience. The development of Clarity Human Services Software has been centered upon the user experience, and this focus has enabled the creation of a simple, intuitive system that is easy to learn and navigate. As a rule, our team takes the extra effort to simplify and streamline complex processes in order to benefit the end user.

At Bitfocus, Inc., each staff member makes the success of your organization their personal priority and commitment. When you engage with the Clarity Human Services staff, you'll find that our focus is on our customers. We strive to build relationships in which trust and success are ensured. Our feature development and product enhancements are a direct reflection of the value we place upon the wisdom of our clients.

At Bitfocus, Inc., we strive to build long term and prosperous relationships with each of our clients. I look forward to a continued partnership with you, our valued client, as we support your efforts to improve the lives of those whom you serve.

Sincerely,

A handwritten signature in dark ink, appearing to read 'R. Herdzik', with a stylized flourish at the end.

Robert Herdzik
President, Bitfocus, Inc

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Getting Started

Introduction

This introductory Training Manual is designed 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 key elements of the Clarity Human Services workflow.

1. Privacy & Security

Clarity users require a unique username and password. Your username will be assigned to you. Your UserID will be created by us. Usually, it will be your first initial and last name, ie., jsmith, but it may vary if that username is already in use. Please take this time to think of your new password. It must meet the following criteria:

- Password must be 8 characters or longer
- Password must contain at least one uppercase character (A through Z)
- Password must contain at least one lowercase characters (a through z)
- Password must contain at least one number (0 through 9)
- Password must contain at least one non-alphanumeric characters
(specifically: ! @ # \$ % ^ & * ())

Additional password restrictions:

- Password cannot be the same as the three (3) prior passwords used for the login account
- Password cannot contain the name of your Clarity instance
- Password cannot contain the word 'clarity'

- Password cannot contain the user's First Name, Last Name or Username
- Password cannot contain 'ABC' or '123'
- Password cannot contain more than two (2) consecutive characters

Example of an acceptable password: S@mp1eP12 (Do not use this one)

Do not share your account

Everything in the system is completely 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 account and do not give anyone access to your password.

Each HMIS user is also required to submit a signed receipt of privacy notice/user policy prior to system access, which appears in Clarity the first time a new user logs into the system.

HMIS Computer Requirements

- Computers/mobile devices in public areas used to collect and store HMIS data must be staffed at all times.
- Password protected screen savers must be automatically enabled when any workstation is not in use.
- Users will be automatically logged off the system after a period of inactivity.
- Written information pertaining to user access should not be stored or displayed in any publicly accessible location.

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

Online help portal: help.bitfocus.com

King County HMIS Website: kingcounty.bitfocus.com

The following web browsers are supported by Clarity:

- Microsoft – Internet Explorer & Edge
- Mozilla – Firefox
- Google – Chrome
- Apple – Safari

Client Consent & Notification

- Clients MUST be given a notification form that explains HMIS and why their personal information is being collected.
- Clients MUST also be given a consent form, which they must sign and agree to before any personally identifying information is entered.
- Every location where an HMIS Intake is being done requires a clearly visible [HMIS Privacy Statement Desk Sign](#), which is available on the King County HMIS Agency Agreements and Policies page (<https://kingcounty.bitfocus.com/kc-agency-agreements-and-policies>).

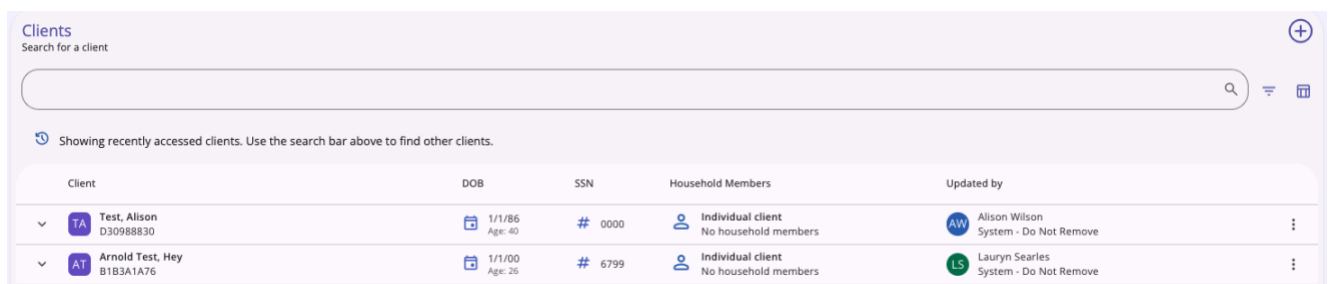
2. Searching for a Client

Before entering a NEW client, you must search to ensure that the client does not already exist in the database.

It is an excellent idea to enter only partial names when searching for a client. For example, if you are searching for Michael Jones, entering mic jon in the search field makes it much easier to find the correct client. See the example below:

You also have the ability to search using the last four SSN digits or a combination of the client name and SSN (mic jon 2333).

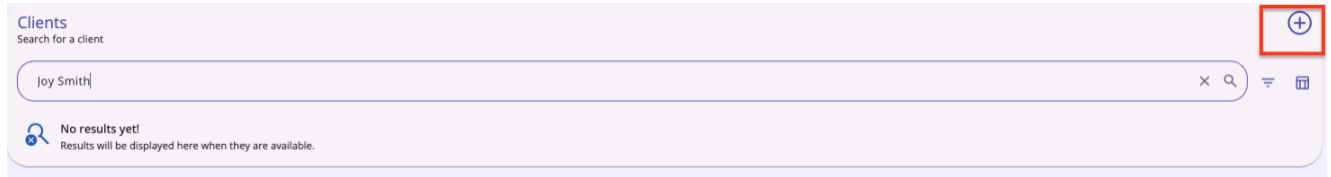
To select a client from your search results, mouse over the client you would like to select to produce an “Edit” option. Click on “Edit” to open the client file.



The screenshot shows the 'Clients' search interface. At the top, there is a search bar with a magnifying glass icon. Below the search bar, a message states: 'Showing recently accessed clients. Use the search bar above to find other clients.' Below this message is a table with the following columns: Client, DOB, SSN, Household Members, and Updated by. The table contains two entries:

Client	DOB	SSN	Household Members	Updated by
Test, Alison D30988830	1/1/86 Age: 40	# 0000	Individual client No household members	Alison Wilson System - Do Not Remove
Arnold Test, Hey B1B3A1A76	1/1/00 Age: 26	# 6799	Individual client No household members	Lauryn Searles System - Do Not Remove

3. Adding A New Client



Clients
Search for a client

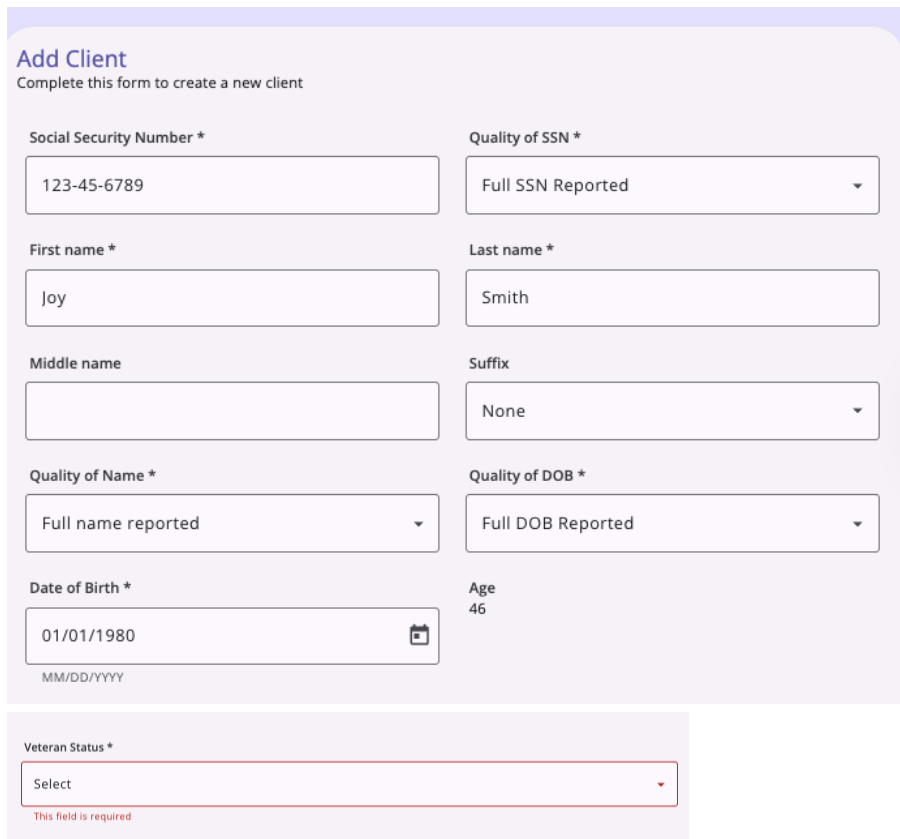
Joy Smith

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

If, after a thorough search, you have determined that your client does not exist in HMIS, click “Add Client” in the upper right corner of the Search screen.

In this example, we are entering client “Joy Smith”.

Complete ALL fields on the following Intake screen with the proper responses and click “Save” at the bottom of the page when you are finished. All fields REQUIRE complete data. If any of the required HUD Universal Data Elements have been left blank, you will be unable to save/create the file. These fields will be highlighted in red for your attention:



Add Client
Complete this form to create a new client

Social Security Number * 123-45-6789	Quality of SSN * Full SSN Reported
First name * Joy	Last name * Smith
Middle name 	Suffix None
Quality of Name * Full name reported	Quality of DOB * Full DOB Reported
Date of Birth * 01/01/1980	Age 46
Veteran Status * Select	

This field is required

Complete the missing fields and click “Save” to create the record.
Please review the Profile Screen to ensure accuracy and completeness.

Online help portal: help.bitfocus.com
King County HMIS Website: kingcounty.bitfocus.com

Don't Know/Refused/Data Not Collected

Selecting "Client Doesn't Know," "Client Prefers Not To Answer," or "Data Not Collected" is permitted and will allow you to save the file. However, each field on this screen makes up the overall data quality percentage for this client. Selecting "Client Doesn't Know," "Client Prefers Not To Answer," or "Data Not Collected" in any field will lower the data quality for this client and impact overall data quality percentages for your agency as a whole.

4. Consent Refused Data Entry

Clients must give written consent to have any personal information stored in HMIS. Personal information continues to include not just names, exact dates of birth, and partial or full social security numbers, but also includes information that may not be identifying in and of itself, but when combined with other non-identifying information, may unintentionally lead to the identification of that person.

If a client refuses consent to have personal information stored in HMIS, the client's consent should be entered as "No" (located behind the Client Privacy Shield), and the consent refused/de-identified data entry protocol should be followed as described below. If one member of a household refuses consent, de-identified data entry protocol should be used for all members, even if others are willing to consent.

Note: Providers serving domestic violence clients must NOT enter client personal information in Clarity Human Services. The following protocol must be used with all domestic violence clients. In addition, providers serving unaccompanied minors under 13 or clients with HIV/AIDS are subject to additional security restrictions. Please consult your HMIS Agency Lead for details.

Consent Refused Data Entry Protocol:

1. From the search screen, click "Add Client"

- Click on the “consent refused” toggle below the Date of Birth field. The SSN, Name and Month and Day of Birth fields will be automatically filled with non-identifying values:

Add Client
Complete this form to create a new client

Social Security Number * 000-00-0000	Quality of SSN * Client prefers not to answer
First name * Generated	Last name * Refused
Middle name 	Suffix Client prefers not to answer
Quality of Name * Client prefers not to answer	Quality of DOB * Approximate or partial DOB reported
Date of Birth * 01/01 MM/DD/YYYY This field is required	
☒ Consent Refused	

- For the Date of Birth, you will see that 01/01/____ appears.
 - Enter a year that is one or two years older or younger (for example, if the client's actual date of birth is 03/16/1980, enter 1982 or 1979 in the Date of Birth field).
 - When you enter the year, an age appears.
 - Make sure the age fits the appropriate age category for the client. If not, adjust the year.
- Only enter Gender, Race, Ethnicity and Veteran status with real data if it will not identify the client in any way
- Leave Middle Name and Suffix blank
- Click on Add Record. The client ID that is generated when the record is saved will automatically replace the first name. The de-identified record should look like this after you save it:

If a client profile has already been created before the Release of Information is refused, and the client is now revoking consent, please contact the [Help Desk](#) to have the record de-identified.

There should not be any reason to create a de-identified record manually. However if you do, make sure contains the de-identified values in the example above, including replacing the first name value with the Client ID number.

5. Release of Information

A Client Consent to Data Collection and Release of Information (ROI) must be completed for each client who consents to have their personally identifying information (PII) entered into the King County HMIS System. Each child must have the consent status documented (one ROI signed by parent/guardian for each child). As of June 7, 2018, unaccompanied minors age 13 and over may sign for themselves.

Note: Client identity could be determined through the identities and relationships of family members. Therefore, all members of a family must be deidentified if consent is refused for any one member.

The form can be signed two ways:

1. **Electronically:** A client can consent by reviewing and signing the ROI form electronically in HMIS.
2. **Hard copy upload:** A client can consent by reviewing and signing a paper version of the ROI and having the service provider scan and upload the signature page into the HMIS. A PDF version of the ROI form for printing and signing can be found on the King County HMIS website.

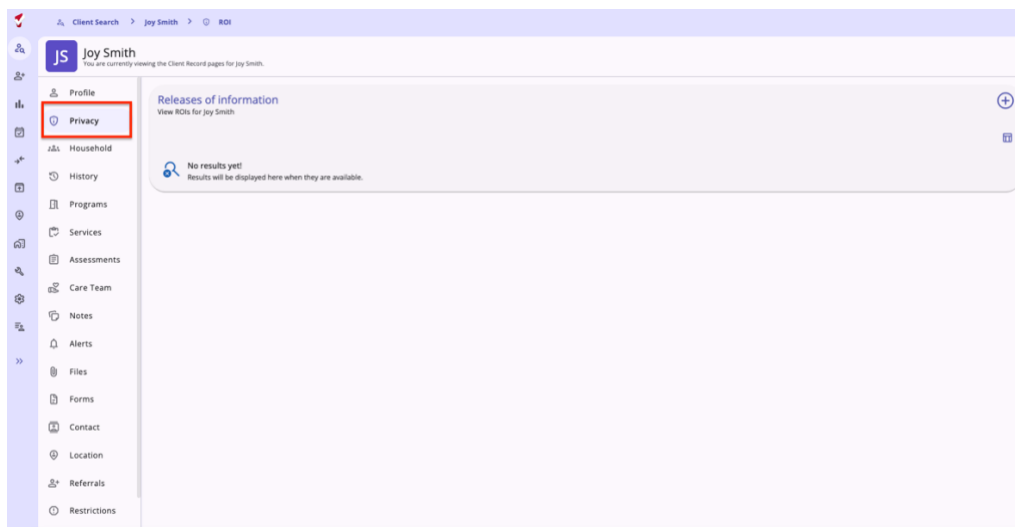
COVID-19 Temporary HMIS Consent Policies - Effective March 25, 2020.

King County HMIS policies now temporarily allow for verbal consent and release of information due to the COVID-19 crisis. Staff must explain the information contained in the Client Consent to Data Collection & ROI (2020) and Client Information Sheet, and answer any questions from client to allow for meaningful informed consent before asking client to consent, and before creating a client profile in HMIS that contains personally identifying information (PII), such as Name, SSN, and Date of Birth.

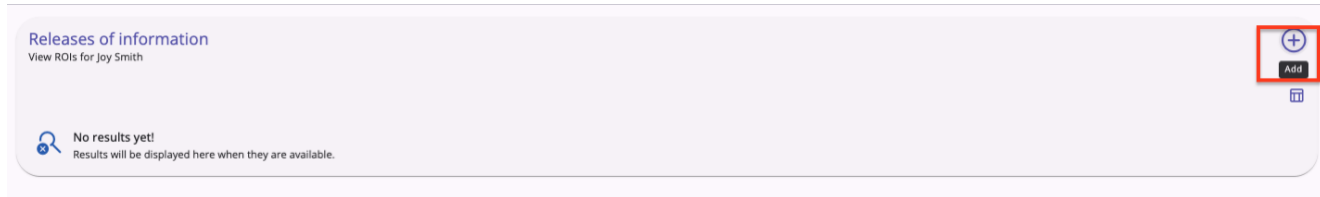
(Note: additional languages other than English can be found on HMIS Webpage) If verbal consent is granted by the client, the client's consent must still be documented in HMIS behind Privacy Shield in HMIS by marking "verbal consent".)

The verbal consent may be in place only until the staff is able to obtain a signed ROI for uploading into HMIS at the next available opportunity when in-person contact can happen. As part of collecting or verifying the identifying information over the phone, staff should be sensitive to any concerns re: safety/domestic violence and must never release/verify to caller any information that the staff person is seeing in HMIS...even if caller has shared PII that matches what is currently showing in HMIS.

1. To document client consent click on the Client Privacy Shield located on the left side of the client profile screen.



2. Click Add Release of Information

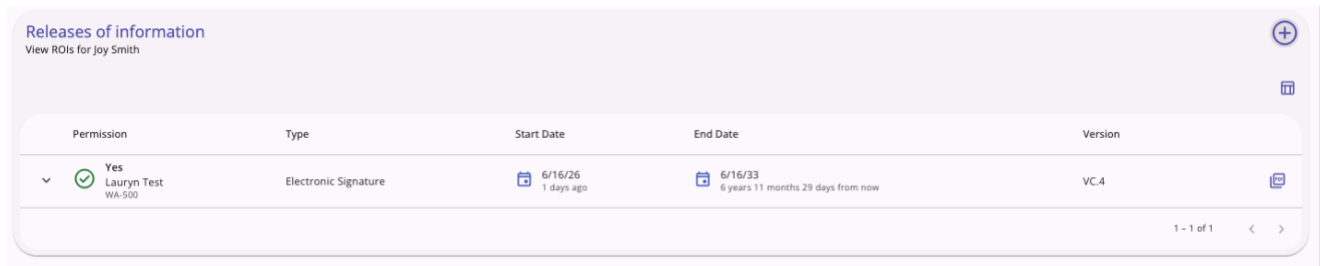


3. Select Yes to document consent:

Permission

Yes = Client provided consent

No = Client did not provide consent



- Start Date

For Yes, this is the date that the client signed the ROI. The "Start Date" defaults to today's date, but it must be updated to reflect the actual date the ROI was signed by the client, if it was not signed on the day you are entering the ROI.

- End Date

For Yes, this is the date that the ROI will expire. It will default to the expiration date configured by the HMIS System Administrator, which is 7 years for King County HMIS.

- Documentation for “Yes” Permissions (client giving consent):

Select Attached PDF or Electronic Signature from the list. You will be prompted to either upload the scanned, hard copy of the ROI signed by your client, or have the client sign the electronic version (see further instructions below). Select “Add Record” once all steps are complete.

For Electronic Signature:

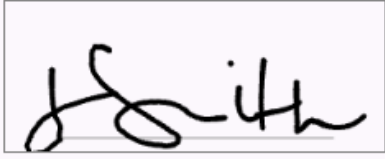
1. Select “Electronic Signature” you’ll be prompted to have your client e-sign their ROI:

The screenshot shows a web form titled "Release of Information". It contains several fields: "Permission *" with a dropdown set to "Yes"; "Start Date *" with a date field showing "06/16/2026" and a calendar icon; "End Date *" with a date field showing "06/16/2033" and a calendar icon; and "Documentation *" with a dropdown menu. The dropdown menu is open, showing options: "Select", "Electronic Signature", "Attached PDF", "Signed Paper Document", and "Verbal Consent". The "Electronic Signature" option is highlighted.

2. Click the "E-Sign Document" button and the ROI form will display. At this point you can share your device with the client, allowing them to scroll through and read the ROI, and then sign at the bottom. They can sign using a touch screen or using a mouse.



Signature of Client or Representative authorized by law:



Signed Date: 06/16/2026

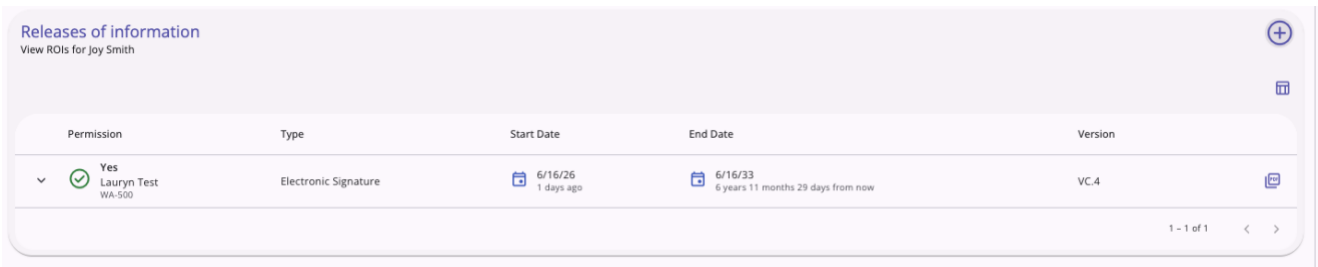
Reset

Apply

Close

Save

3. After they've signed, select "Apply" and then "Save."
4. Once you've saved the record, you'll see it show up in the Release of Information section. Click the red PDF icon at the right to display a PDF of the ROI, including signature, that you can print for the client or for agency records.



Releases of information
View ROIs for Joy Smith

Permission	Type	Start Date	End Date	Version
Yes Laurn Test WA-500	Electronic Signature	6/16/26 1 days ago	6/16/33 6 years 11 months 29 days from now	VC.4

1 - 1 of 1

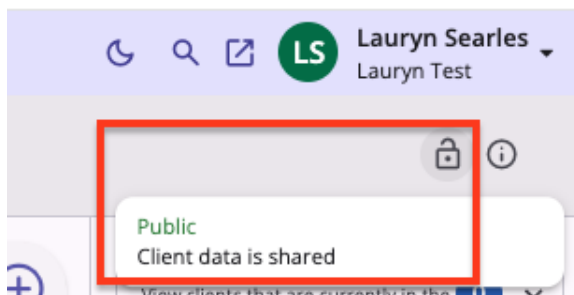
*Note: Only one ROI per client per active start/end date range is permitted. The system will not allow you to upload a second ROI within the same date range.

To Revoke Consent:

1. A client may revoke consent by completing and signing the Client Revocation of Consent form. It is the provider's responsibility to securely store this form.

2. The agency must then contact the Bitfocus Help Desk (kcsupport@bitfocus.com) and request that the client record be de-identified. When you contact the Help Desk, **do not include any personally identifying information** - the client's Clarity Unique Identifier and the reason for de-identification is sufficient. The Help Desk may ask a few questions to ensure that all protocols are being followed and/or may direct you to work with Coordinated Entry for All if your client has been assessed for housing through coordinated entry.
3. Make sure your client has their Clarity Human Services Unique Identifier to provide to other providers in order to avoid creation of duplicate records.
4. It is the provider's responsibility to maintain a record of Clarity Unique Identifiers when de-identifying client profiles.

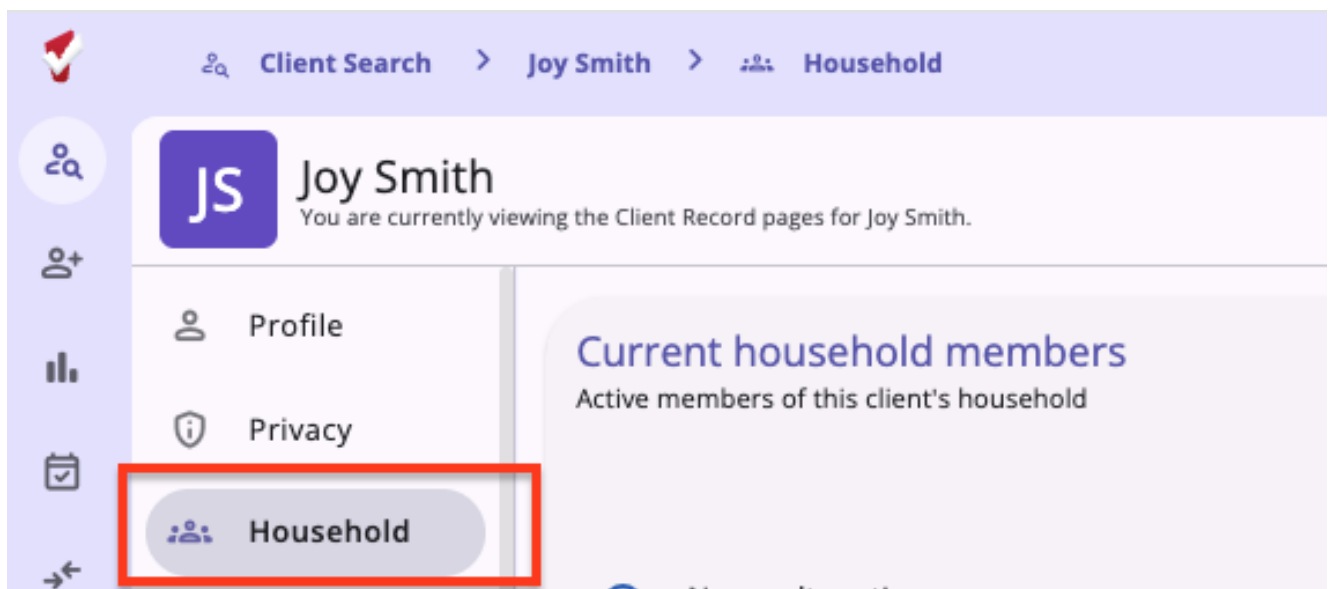
Note: On the Client Privacy screen, all records should maintain the default setting of "Public". King County operates a shared "open system", meaning that agencies can view all records within the system. The "Private" setting should never be used, as this is against system protocol.



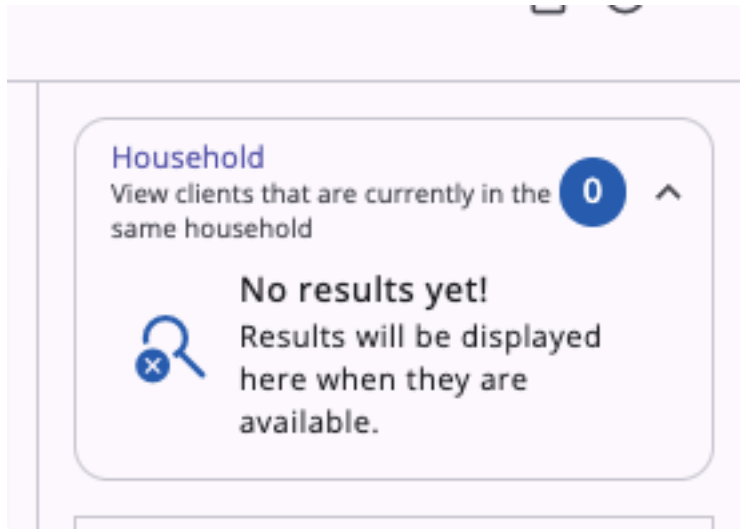
If you have questions regarding ROIs, please see the ROI Frequently Asked Questions document on the King County HMIS Forms & Guides page (<http://kingcounty.hmis.cc/client-forms/>).

6. Creating Family/Household Groups

Begin by verifying that each family/household member exists in HMIS. If they do not, complete the above steps for "Adding A New Client" to create a file for each member. Open the profile for the **head of household (HoH)**. In the upper left corner, in the Client Level tabs, click "Household".

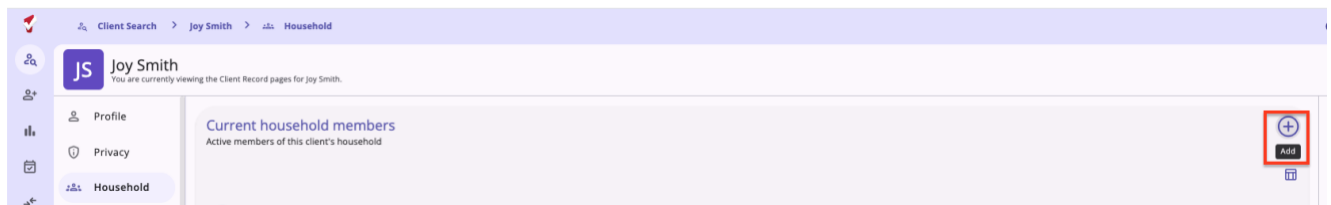


If you have recently accessed the family member files, they will be listed on the right side menu under the header "Your recent client searches accessed." If the family member is listed there, click the plus sign + to add them to the head of household's group.



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

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



Add household member

1 Select or add a client

Clients
Select or create a client that will be added to the household

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

Client	Date of Birth	SSN	Last Updated
HA Hey Arnold Test	1/1/00	6799	5/4/26

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

If a member leaves the household, clicking “Edit” from the Household list will allow you to enter an End Date to remove them from the group.

If the person exiting the household is the Head of Household, you will need to designate a new HoH before you can save the HoH’s exit from the household.

7. Adding A Client Photo

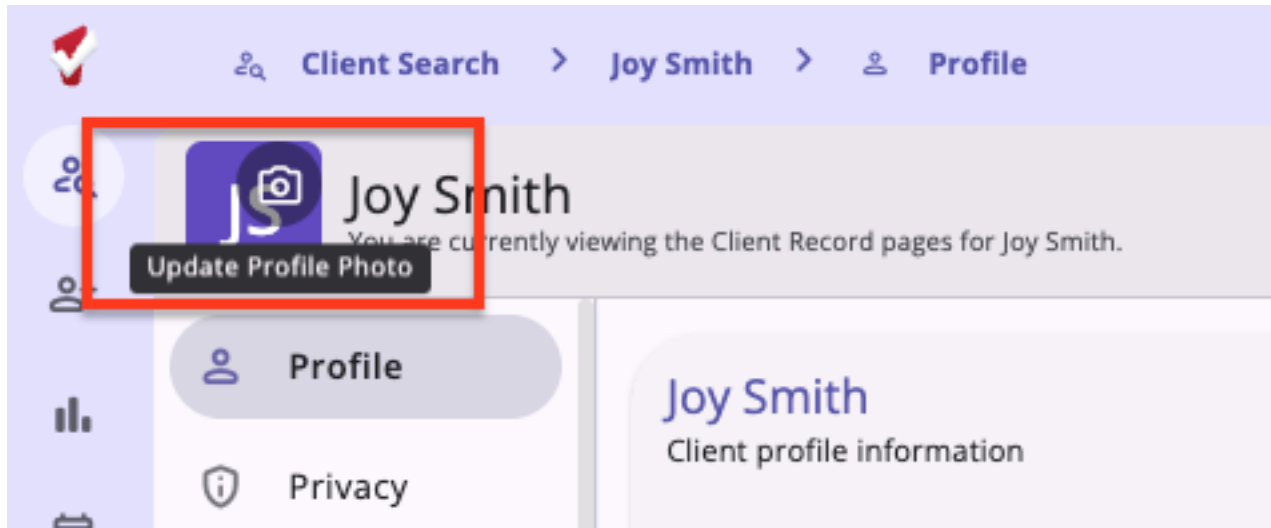
Uploading photos to your client files can provide a quick method of identification.

There are 2 ways that you can upload a photo to a client’s profile.

One way is to take a picture with a camera and upload it. To upload the picture:

- Save a digital photo of the client to your computer.
- From the Client Profile screen, select “Update Profile Photo” in the upper left corner.
- Click “Select File” from the Upload Photo screen.

- Locate and select the photo from its location on your computer.
- Click "Upload"
- Your saved photo will now be visible from the Client Profile screen.



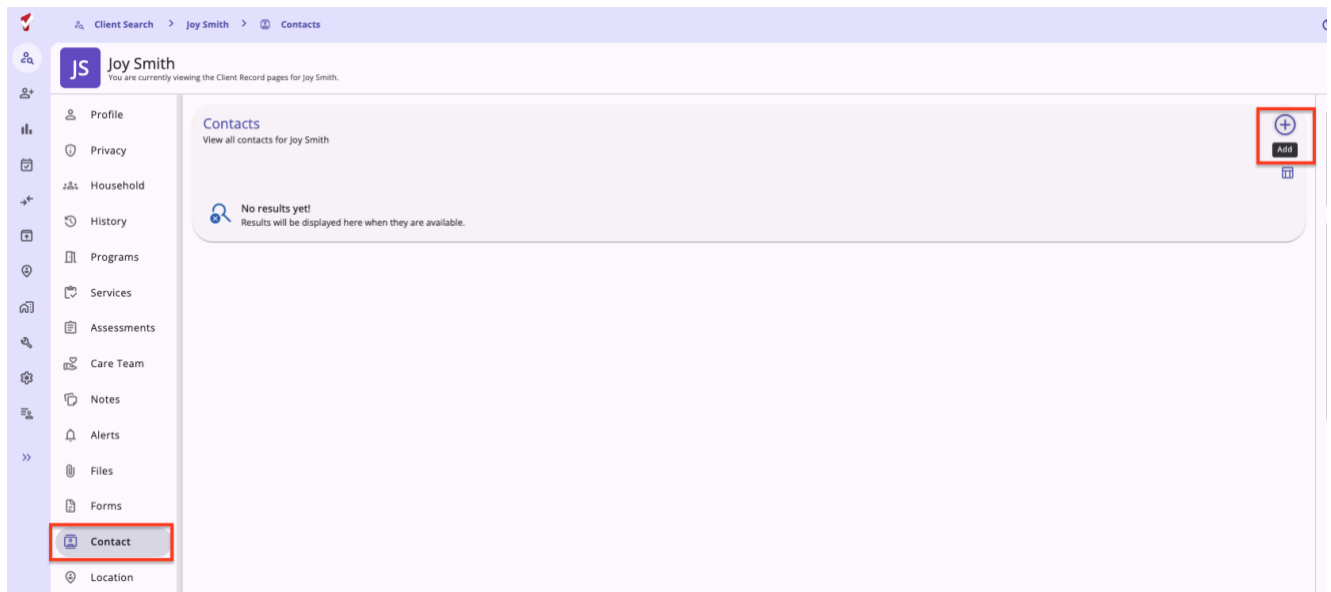
Another way is to take a photo using a webcam attached to your computer:

- From the Client Profile screen, select "Update Profile Photo" in the upper left section.
- Select "Capture Photo"
- Follow the directions in Clarity for cropping the photo (if desired) or deleting and retaking the photo (if desired).
- Once you have a satisfactory photo, click "Save Picture" and the photo will appear on the client profile page.

8. Adding Address & Contact Information

To add client contact information:

1. Click on the "Contact" tab in the client file and then select "Add Contact."



2. Complete Contact information and click "Save."

Online help portal: help.bitfocus.com
King County HMIS Website: kingcounty.bitfocus.com

Add Contact
Add a new contact for Joy Smith

Contact Type *
Client

Email
test@test.com

Phone (#1)
XXX-XXX-XXXX

Phone (#2)
XXX-XXX-XXXX

Active Contact

Contact Date *
06/22/2026

Note
Contact Information Here

Cancel Save

To add a client location or address:

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

Client Location
View a list of the locations for the client

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

Map of Los Angeles showing various locations.

Buttons: Add Address, Add Field Interaction

2. Enter all required contact information. Select the checkmark once you've identified the correct Street Address and click "Save."

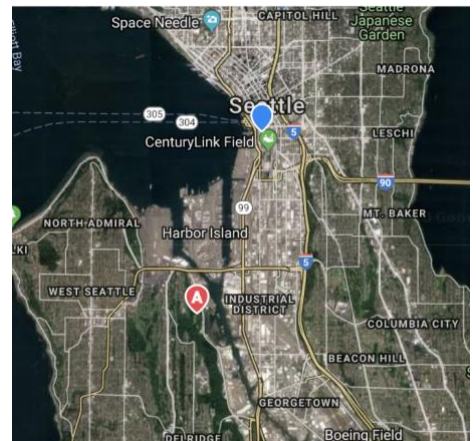
The image shows a screenshot of the 'Add Client Location' form on the left and a map view on the right. The form has fields for 'Address Type *' (set to 'Mailing'), 'Name *' (set to 'Joy'), 'Search Address' (set to '1112'), 'Address (line 2)', 'Location Date *' (set to '06/16/2026'), and an 'Active Location' toggle (checked). At the bottom are 'Cancel' and 'Save' buttons. The map view on the right shows a street map with a red pin at '704 1st Ave, Seattle, Washington, 98104-1403'. A red box highlights the checkmark icon in the bottom right corner of the map view.

When the Active Location toggle is enabled, it is considered an Active address, otherwise it is Inactive

Do not activate the Private toggle. Other agencies including Coordinated Entry need to be able to contact the client to offer services or housing.

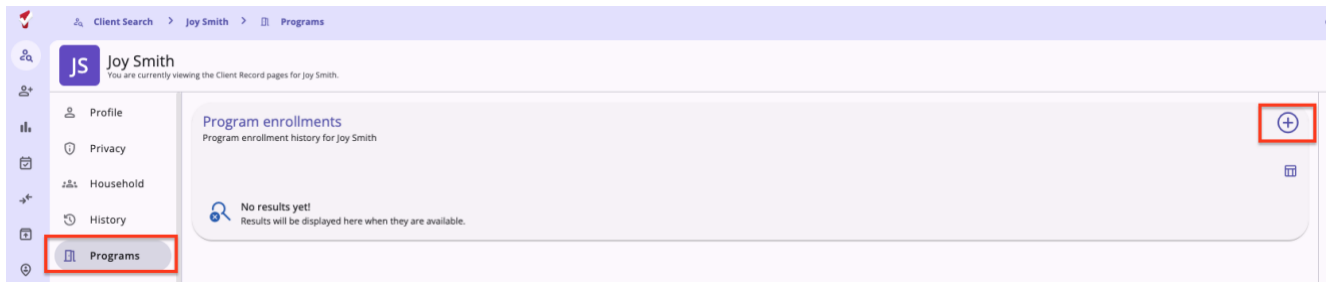
You will be notified at the top of the screen that your record has been saved.

Clarity HMIS utilizes Google Maps to chart the location of your client. After adding an active address, that location will be visible in the map on the Location tab. The location of your agency will also be shown.



9. Enrolling Clients into Programs

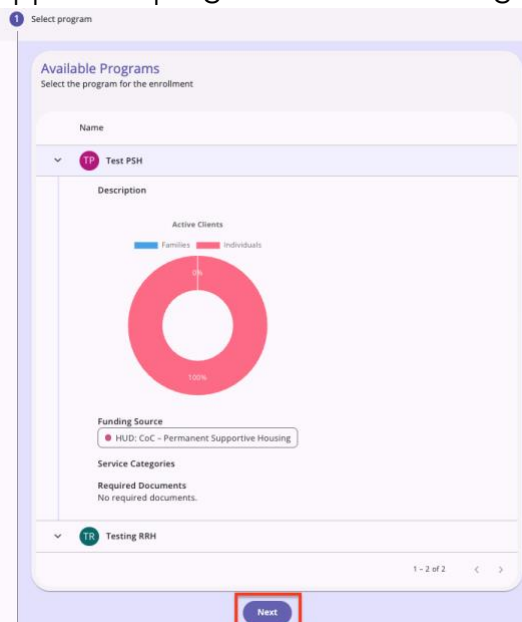
The Programs tab in the client file contains two sections:



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

Programs Available lists active HMIS programs at your agency that are available for client enrollment.

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



Select the group members to include (if applicable) and click "Next." In the example below, we are enrolling both Joy Smith and family members Hey Arnold Test. In this case, Joy

Smith will become the Head of Household for the enrollment and the family member will become part of the Group Enrollment when we toggle to include them before clicking the "Next" button.

Add program enrollment

1 Select program

2 Include household members (optional)

Select members (optional)
You can select other household members below to add to the enrollment or just leave this empty and save to continue.

Household Members

Joy Smith

☒ Hey Arnold Test

Next

3 Joy Smith entry screen

4 Hey Arnold Test entry screen

5 Completed

It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to local and federal funder data requirements. All required data elements must be completed in order to save the client enrollment.

Complete ALL fields in the enrollment page for your client and click "Save & Next." If you include any group members in this enrollment, their Enrollment page will automatically come up next until every member's enrollment has been completed.

When viewing an enrolled household member's enrollment, all other enrolled group members will be listed under "Group."

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

TR Testing RRH
Lauren Test
PH - Rapid Re-Housing

6/22/26 - Active
1 days ago

Home History **Group** Services Assessments Notes Units/Beds Files Forms Assigned Staff Exit

Group members
View household members also enrolled in Testing RRH or add new members

Name	Start Date	End Date
Joy Smith Not Set	6/22/26	Active
Hey Arnold Test Son	6/22/26	Active

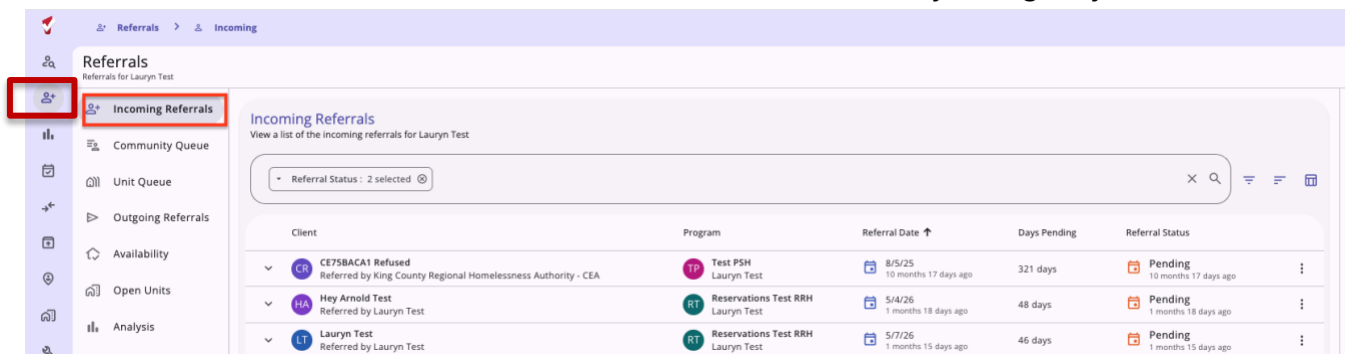
1 - 2 of 2

Coordinated Entry Program Enrollment

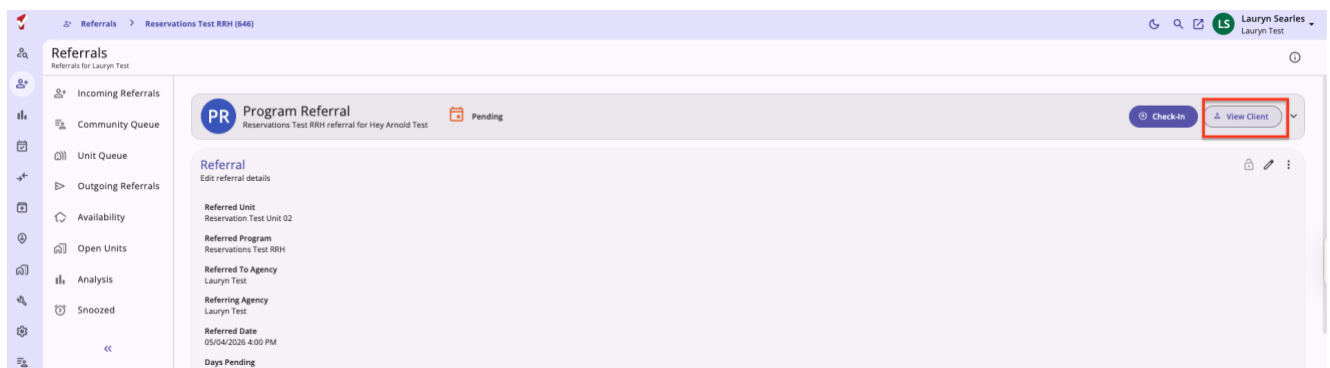
More information and updates can be found on the [King County Coordinated Entry System \(CES\) website](#).

HMIS is used as part of the Continuum of Care's CES system in accordance with the [CES Policies and Procedures](#), and aligned with the HMIS Data and Technical Standards at (CoC Program interim rule) 24 CFR 578.7(a)(8).

If your agency is participating in the Coordinated Entry System, many enrollments will be processed through the Referrals tab located at the top left when you are on the main Search screen. Select the Referrals tab to view referrals sent to your agency.



To enroll a client from the Incoming Referrals tab of the Referrals section, select "View Client"



Notice that selecting the 'Edit' icon will take you to the Referral: Edit screen where you can indicate that the referral is "Pending In-Process" or deny the referral and send it to the Community Queue tab (if applicable).

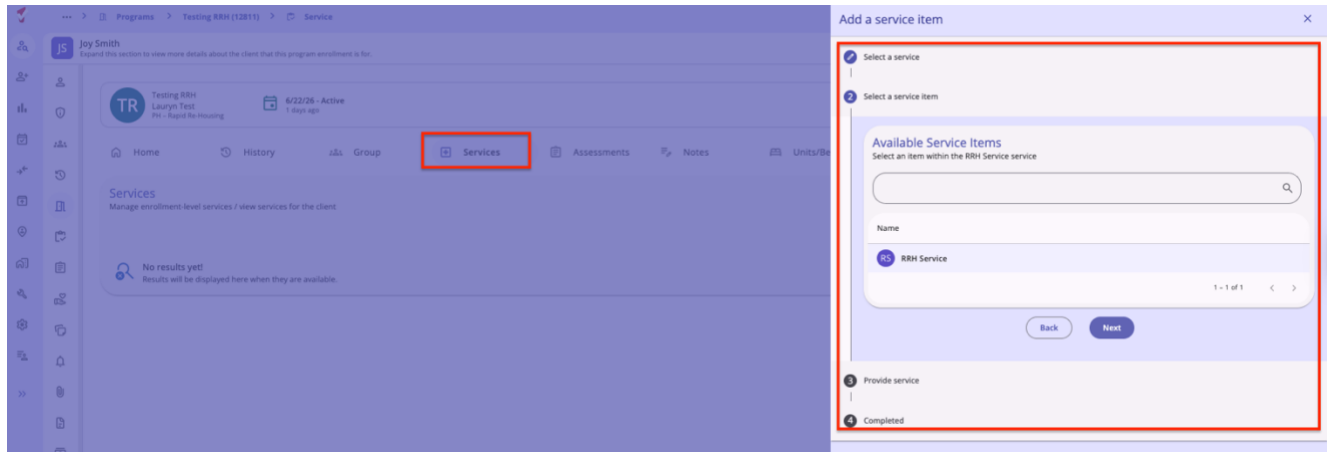
Selecting “View Client” will take you to the Profile screen of the client record. Go to the Programs tab and select the correct program. Follow the same steps outlined above to enroll the client into the appropriate program. When you enroll a client into a program from a referral, Clarity notifies you that the enrollment is the result of a referral, and includes the name of the agency that submitted the referral to the community queue.

The screenshot shows the 'Add program enrollment' form with a purple header and a close button (X) in the top right. The form is divided into steps: 1. Select program, 2. Include household members (optional), 3. Hey Arnold Test entry screen, and 4. Completed. Step 1 is active. Under 'Available Programs', there is a search bar labeled 'Name' and a list of programs. One program, 'TP Test PSH', is selected. A red box highlights a 'Pending Referral' notification that appears over the program list. The notification contains the following text: 'Pending Referral (Referral date: 6/18/2026)', 'Pending Referral', 'Sent by: King County Regional Homelessness Authority - CEA', 'Date: 06/18/2026', and 'Status: Pending'. Below the notification is a 'Next' button. The notification also includes a small '1' and navigation arrows (< >).

10. Entering Services

When all Enrollments are complete, the “ Services” tab will appear within the Program Enrollment.

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

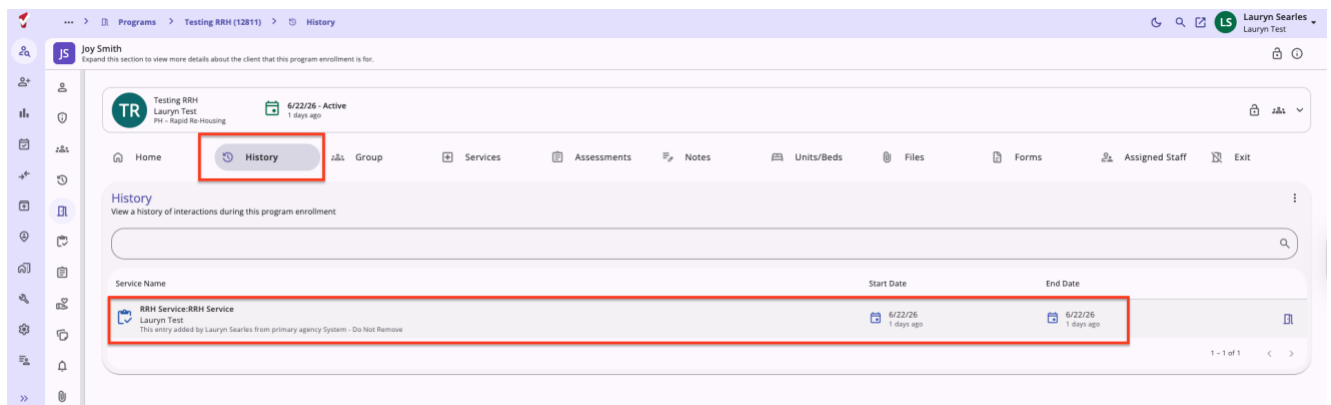


Enter the Start and End Dates and any expense associated with the service, and select any group members who should also receive this service.

Click “Save” to complete the service placement.

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

When you have finished, the services should be visible from the Program History:

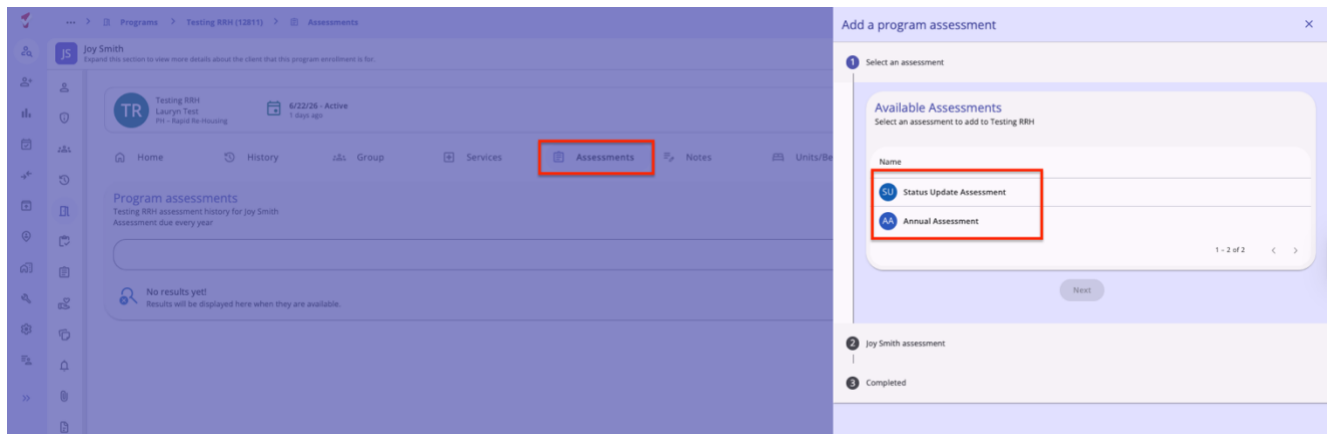


Online help portal: help.bitfocus.com
King County HMIS Website: kingcounty.bitfocus.com

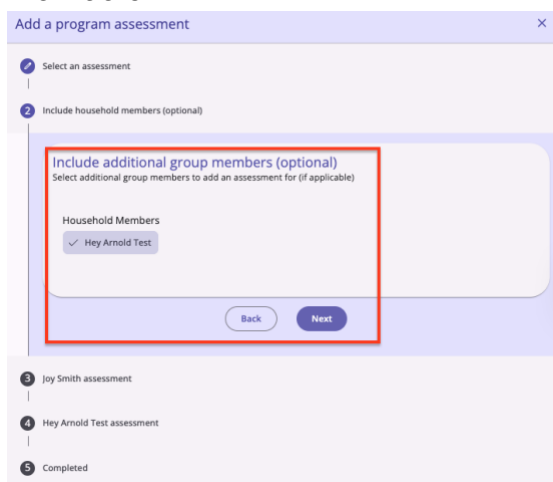
11. Completing Status or Annual Assessments

Depending upon the funding source for your program, you may be required to complete Status and/or Annual Assessments at regular intervals for all active clients. These are generally completed every 90 days (for Status Assessments) and/or once per year (for Annual Assessments). ***All HMIS enrollments that are active/open require an annual assessment within 30 days of the project start anniversary date each year (a 60-day window).*** Please check your contract for other specific requirements.

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



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



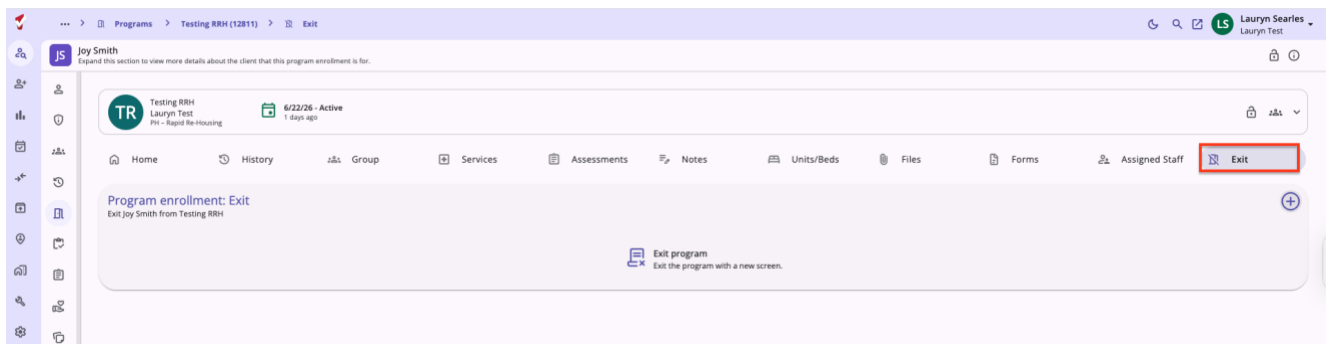
Select "Add Status Assessment" or "Add Annual Assessment." Complete all data fields on the Program Status screen and be sure to enter the correct date the assessment was conducted. Click "Save & Next" when you are finished. If this is a group case, additional members' assessment/program status screens will appear until each has been completed.

Note: For reports like the Annual Performance Report (APR), in order for a client's information to be included in the measures that are "at latest annual assessment," the assessment entered must be the *annual* assessment within the 60-day window and cannot be just a status assessment within the 60-day window.

12. Exiting Clients from Programs

All clients must be properly exited upon completion of the program or according to the policies outlined in the King County HMIS Standard Operating Procedures. From the Programs tab in the client file, find the program you wish to exit the client or household from and open the enrollment by clicking on the Edit icon.

Once the enrollment is open, click on the Exit button over to the right.

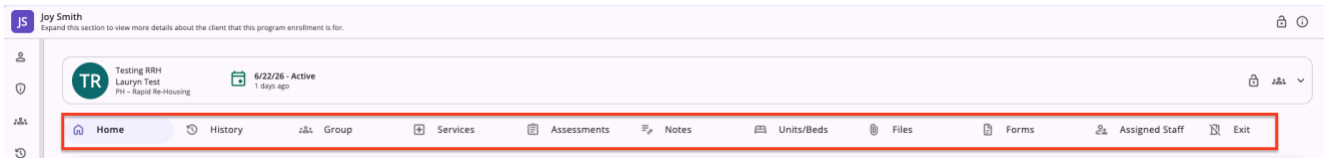


If this enrollment is a Group enrollment, you will be asked which members of the household you will be exiting (in most cases you should toggle each member and exit all group members at once). If you had check marked any group members to also be exited from this program, their Exit screen will automatically come up next until each member has been completed. Continue to click "Save & Next" after completing exit information for each group member.

If only part of the household is exiting, be sure there is a head of household among the remaining members. In the client program screen the head of household is listed in a box on the right side. If the person listed there has exited, click on edit and change another adult in the household to "self, head of household" and the exited member to another appropriate relationship to head of household.

Complete ALL data on the Exit screen. Entering full exit data for all clients is extremely important to reporting outcomes for your programs and community.

13. Program Tab Overview



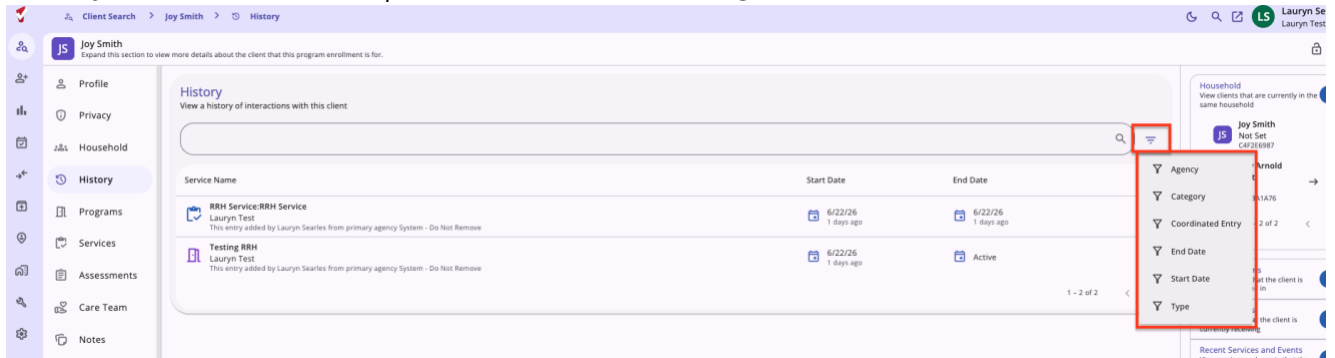
- Enrollment – opens the enrollment screen that was completed at entry
- History – history of client’s services associated with the program with the option to edit
- Services – allows placement of services associated with the program
- Assessments - option to view/edit or add status and/or annual assessments
- Exit – opens the exit screen completed at termination of the client’s program stay

14. History Screen Overview

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



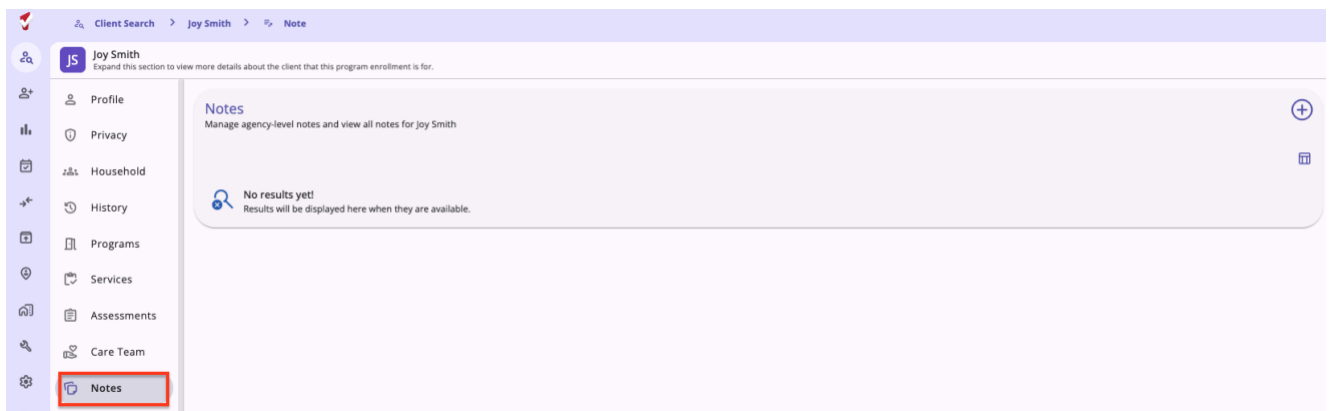
If your client has a very large history spanning multiple pages of results, you can filter the History results. The filter options allow the following criteria:



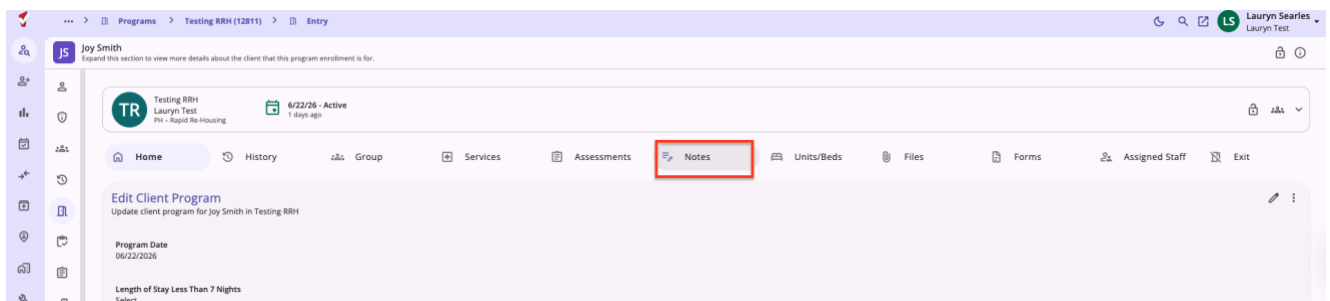
- Search – Filter for a keyword within the service title
- Category – Filter for a specific category of service using the convenient drop-down
- Agency – Filter for a specific Agency that provided the service
- Date Range – Filter based on a specific date range of service provision
- Type -- filter for Assessment, Programs, Referrals, Services, or any/all of the record types

15. Case Notes

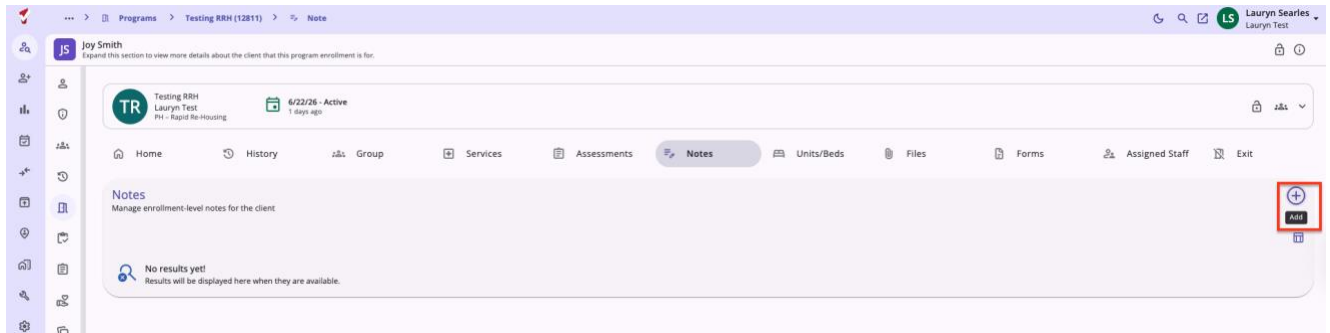
There are two different types of case notes within Clarity. There are program notes, which are connected to a client's specific program enrollment, and there are client notes, which are connected to the client but not connected to a specific program enrollment. King County sharing settings allow you to see only notes created by users from your agency. Client Notes appear under the Notes tab in the Client ribbon.



Program Notes appear in the Notes tab within the relevant enrollment.



To add a note in either section, click on the Notes tab in the appropriate section. In the upper right corner, click on the "Add" icon.



Saved case notes will be displayed by date. Mouse over to open/edit notes from your agency.

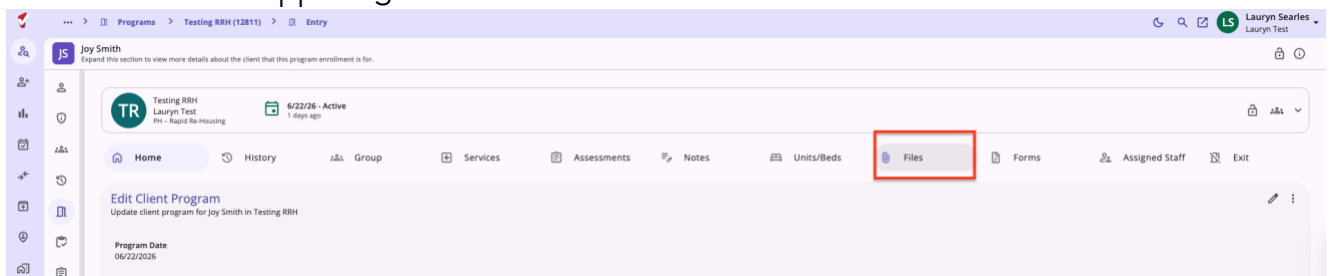
16. Uploading Files

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

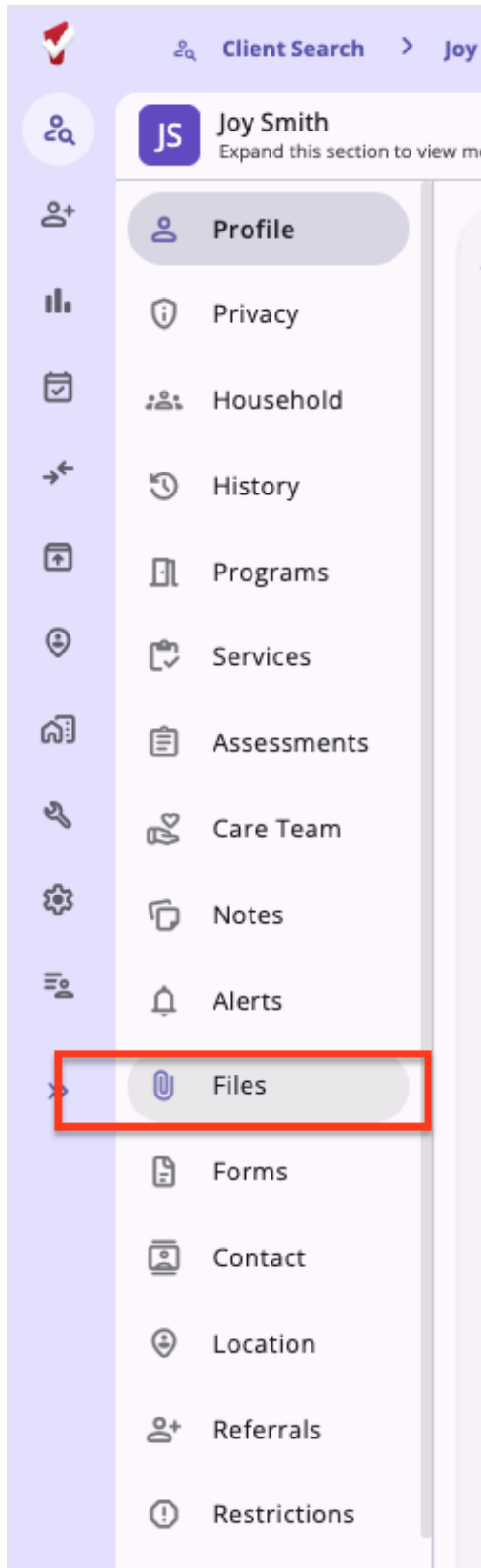
Similar to notes, there are two places that you can upload files and files uploaded to a specific program will also display under client files.

To add a file to a program:

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



By clicking "Select File" you are using an advanced upload to select the file from your personal computer. If your system is not compatible with the advanced upload, you can choose the Basic Uploader.



Private – When checked, the file becomes Private and only your agency will have the ability to view the file. When unchecked, regular Sharing Rules for your agency apply. In King County, files can be seen by all users in all agencies unless marked private.

Click “Save” to complete the upload and save.

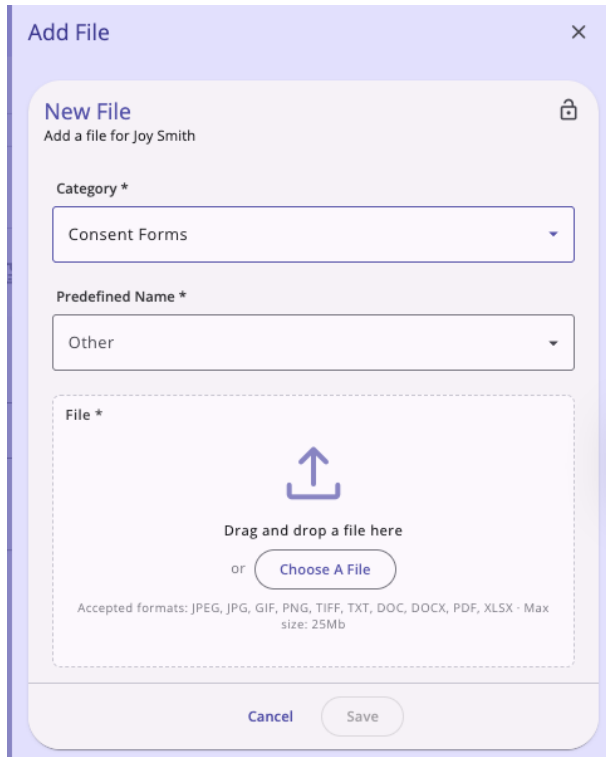
To add a file to a client record:

Open the client’s file tab, select “Add a File,” and follow the setups outlined above.

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

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

Clarity supports all of the most common file types (Word, Excel, PDF, JPG, PNG, etc.).

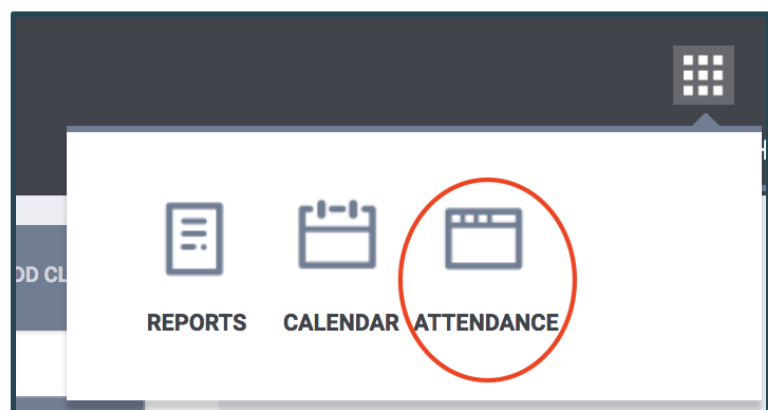


The 'Add File' dialog box is shown with a close button (X) in the top right corner. It contains a 'New File' section with a lock icon and the text 'Add a file for Joy Smith'. Below this are two dropdown menus: 'Category *' with 'Consent Forms' selected, and 'Predefined Name *' with 'Other' selected. A large dashed box labeled 'File *' contains an upload icon and the text 'Drag and drop a file here' or 'Choose A File'. Below the dashed box, it lists 'Accepted formats: JPEG, JPG, GIF, PNG, TIFF, TXT, DOC, DOCX, PDF, XLSX - Max size: 25Mb'. At the bottom are 'Cancel' and 'Save' buttons.

17. 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 night-by-night Emergency Shelters, are entered in Clarity HMIS using the Attendance button located in your launcher.



NOTE: You will only have an Attendance button in your launcher if your agency provides services that have been set up for daily attendance.

After clicking on the Attendance button, a list of services available for daily intake is

ATTENDANCE	
Service Name	Category
Attendance: Attendance	No Category
[Emergency Shelter] ES Housing: ES Housing	Housing

provided.

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

There are two columns on the Attendance screen:

- In Attendance (left column) - all clients currently in attendance for the date selected
- Clients from last 4 months (right column) - all clients who have been in attendance at least once during the last 4 months.

[DAY CENTER] CHECK-IN: [DAY CENTER] CHECK-IN

Date 07/26/2019

Friday, July 26th, 2019

Manual Scanned

In Attendance

Client Name	Last 4 SSN	
Smith, Jody	6789	

Clients from last 4 Months

Client Name	Last 4 SSN	
Jones, Baby	4582	Add
Jones, Michael	5678	Add

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

You can also search and add from the right side navigation menu. Here we can see that the project is set up to require an enrollment before we can add the daily attendance service (Joey is showing as Not Enrolled).

[EMERGENCY SHELTER NBN STACY] ES BED NIGHT: [EMERGENCY SHELTER NBN STACY] ES BED NIGHT

Date 02/03/2017

Friday, February 3rd, 2017

Manual Scanned

In Attendance

Client Name	Last 4 SSN	
Forest, Leaf	3873	

Clients from last 4 Months

Client Name	Last 4 SSN	
Es-Active, Client1	3784	Add
Forest, Sally	3923	Add

Client Search

[SEARCH](#)

Clients Name	Date of Birth	Last SSN	
☒ Forest, Joey	11/24/2017	6262	Not Enrolled
☒ Forest, Leaf	07/04/1975	3873	Added
☒ Forest, Sally	04/15/1979	3923	Add

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

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

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

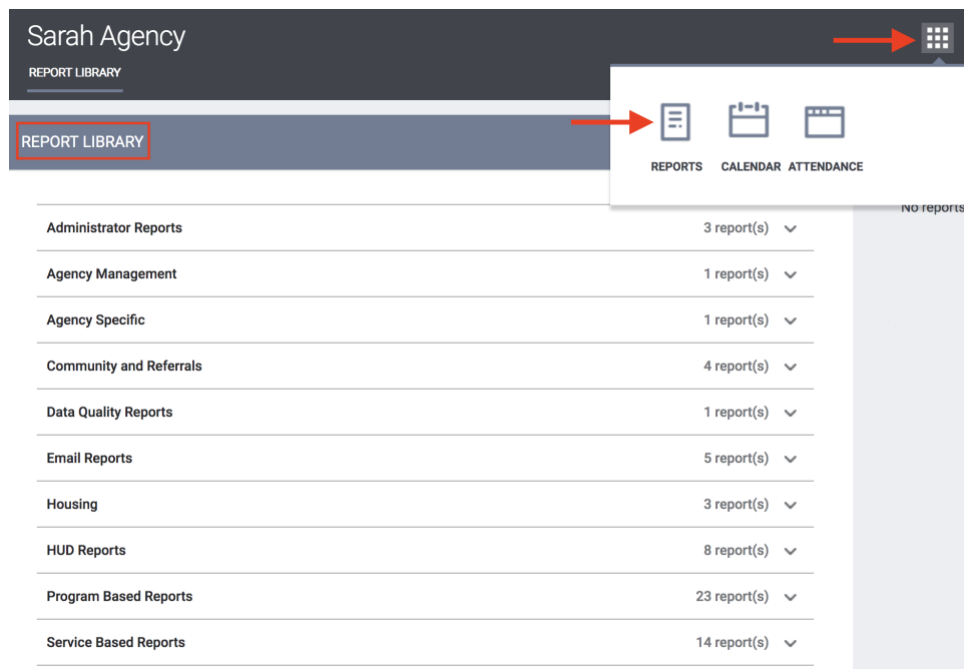
If your agency is using a scanner to enter clients into service via scan cards, use the Scanned button to upload your data file.



18. Reporting

Accessing the Report Library

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

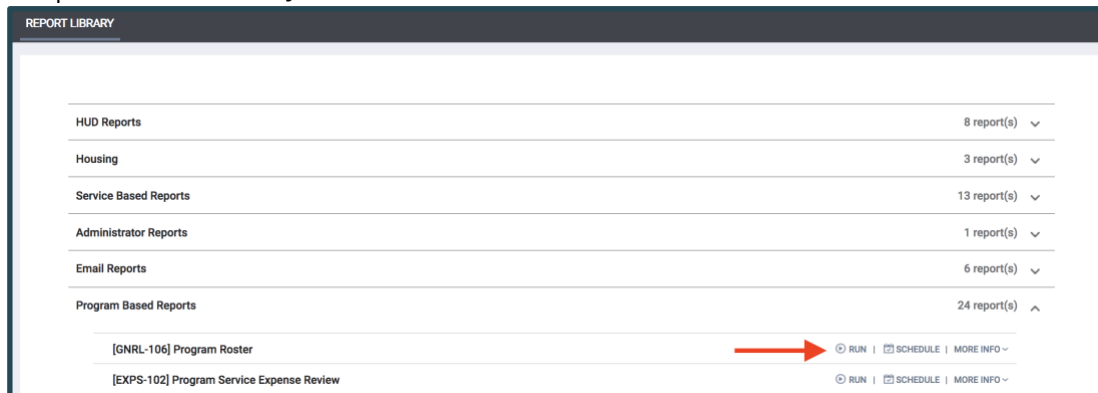


This will bring you to the Report main screen, which is divided into several sections according to report type, with Show/Hide features for easy organization. The report section

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

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

To run a report immediately, click "Run."



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

Most reports require a starting date and an ending date:

- Starting Date: This date will reflect the date from which you would like to generate data.
- Ending Date: This date will reflect the date you would like to stop generating data.

Most reports are available in three formats and will ask you to select a report format. You can select Web Page, PDF, or Excel.

- Web Page: A Web Page is a functional format that allows you to drill down on data elements to inspect the underlying data supporting it.
- PDF*: The PDF is a good option for official reports, grants, etc.
- Excel file*: If you download the excel file you can use excel to manipulate and organize the data (e.g. Sort/Check for duplicates, etc.).

*Note on downloaded reports: Remember to handle files with Personally Identifiable Information appropriately to meet privacy and security standards.

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

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

REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s)

Status

Report Date Range -

Report Output Format ☒ Web Page ☐ PDF ☐ Excel

SUBMIT

REPORT QUEUE MANAGER.

Your report has been added to the Queue.
Please check the Queue Manager in the top right of your screen to review processing status.

REPORT IS READY.

Report "[GNRL-106] Program Roster" is completed.

OPEN

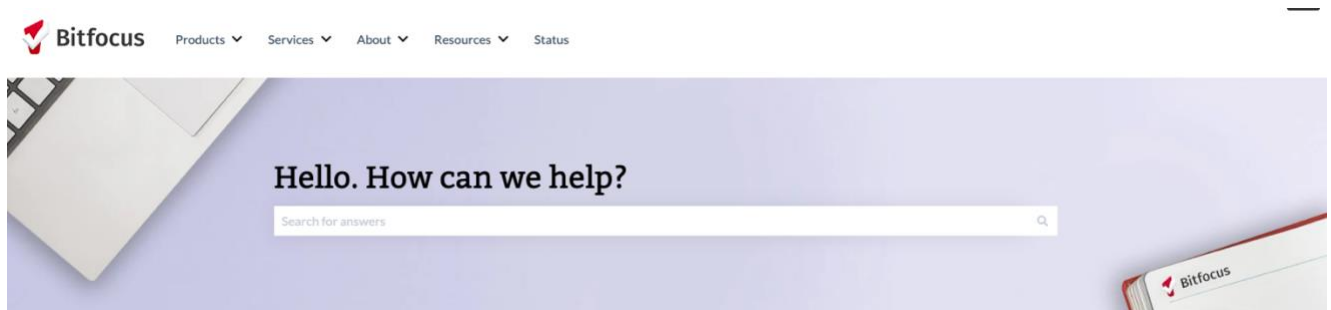
[close all]

Online help portal: help.bitfocus.com
King County HMIS Website: kingcounty.bitfocus.com

Where to find more information

Want to utilize other features of the Clarity Human Services HMIS software? This manual is not comprehensive, and there are other tips and helpful features that may be beneficial such as public alerts, client appointment calendars, client level reports, and/or easy caseload access. Explore the Clarity Human Services Help Portal (help.bitfocus.com) for more information. It is a great resource for questions about how to use our HMIS software and includes directions for everything from creating a client to using data analysis tools. Articles in the Help Portal have both text explanations and images that demonstrate the functionality.

You can enter keywords in the search bar to locate guidance regarding a specific topic.



Here are some examples of the questions the Help Portal can answer:

- [How do I search for a client?](#)
- [How do I create a new client?](#)
- [How do I enroll clients in a program?](#)
- [How do I exit a client?](#)
- [Where do I complete my client's annual status assessment?](#)
- [How do I change my HMIS password or add an avatar?](#)