



HMIS End User Manual

King County

Homeless Management Information System

(888) 866-1533

kcsupport@bitfocus.com



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.

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,



Robert Herdzik
President, Bitfocus, Inc

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

Table of Contents

Welcome to Clarity Human Services!	1
Getting Started	4
Introduction	4
1. Privacy & Security	4
Do not share your account	5
HMIS Computer Requirements	5
Client Consent & Notification	7
2. Searching for a Client	7
3. Adding A New Client	8
4. Consent Refused Data Entry	10
5. Release of Information	13
6. Creating Family/Household Groups	18
7. Adding A Client Photo	20
8. Adding Address & Contact Information	21
9. Enrolling Clients into Programs	24
Coordinated Entry Enrollment	26
10. Entering Services	28
11. Completing Status or Annual Assessments	30
12. Exiting Clients from Programs	31
13. Program Tab Overview	33
14. History Screen Overview	34
15. Case Notes	35
16. Uploading Files	37
17. Daily Attendance Service Transactions	39

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).

SEARCH FOR A CLIENT

mic jon

Search

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

	Date of Birth	Last Four SSN	Last Updated
Michael Jones	09/20/65	2333	08/18/15
Michael Jones	09/19/65	3454	08/18/15

Managed with Clarity Human Services

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.



3. Adding A New Client

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

SEARCH FOR A CLIENT

ADD CLIENT +

smi jod

SEARCH

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

⚠ 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.

example, we are entering client Jody Smith.

Complete ALL fields on the following Intake screen with the proper responses and click “Add Record” 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:

Complete the missing fields and click “Add Record” to create the file.

Please review your intake to ensure accuracy and completeness.

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

CREATE A NEW CLIENT

Social Security Number	123 - 45 - 6789
Quality of SSN	Full SSN Reported
Last Name	Smith
First Name	Jody
Quality of Name	Select
Quality of DOB	Full DOB Reported
Date of Birth	12/25/1970Adult Age: 47
Alternate Client ID and/or Also Known As and/or Alias	
Gender	Female
Race	American Indian or Alaskan Native
Ethnicity	Non-Hispanic/Non-Latino
Veteran Status	No
Middle Name	
Name Suffix or Prefix	None

ADD RECORD

CANCEL

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

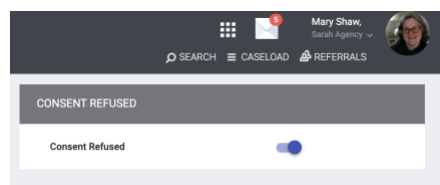
Clients must give written consent to have any personal information stored in HMIS. Personal information continues to include not just names, exact dates of birth, and partial or full social security numbers, but also includes information that may not be identifying in and of itself, but when combined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



2. Click on the "consent refused" toggle to the right of the profile. The SSN, Name and Month and Day of Birth fields will be automatically filled with non-identifying values:

The screenshot shows a web form titled "CREATE A NEW CLIENT" on the left and a "CONSENT REFUSED" toggle on the right. The form fields are as follows:

Field	Value
Social Security Number	000 - 00 - 0000
Quality of SSN	Client prefers not to answer
Last Name	Refused
First Name	Automatically Generated
Quality of Name	Client prefers not to answer
Quality of DOB	Approximate or partial DOB reported
Date of Birth	01/01/
Alternate Client ID and/or Also Known As and/or Alias	
Race and Ethnicity	Select
Additional Race and Ethnicity Detail	
Middle Name	
Name Suffix or Prefix	None

At the bottom of the form are two buttons: "ADD RECORD" and "CANCEL".

On the right, the "CONSENT REFUSED" toggle is shown with a blue circle, indicating it is turned on. Below the toggle are the labels "Consent" and "Refused".

At the bottom left of the form, it says "Managed with Clarity Human Services".

3. 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.
4. Only enter Gender, Race, Ethnicity and Veteran status with real data if it will not identify the client in any way
5. 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:

CLIENT PROFILE

Social Security Number

*** - ** - xxxx ?

Quality of SSN

Client doesn't know

▼

Last Name

Refused

First Name

4934F6D83

Quality of Name

Client prefers not to answer

▼

Quality of DOB

Approximate or partial DOB reported

▼

Date of Birth

01/01/1980

Adult Age: 45

Alternate Client ID and/or Also Known As and/or Alias

Race and Ethnicity

Hispanic/Latina/o

▼

Additional Race and Ethnicity Detail

Veteran Status

No

▼

Middle Name

Name Suffix or Prefix

None

▼

UNIQUE IDENTIFIER

4934F6D83

i

SAVE CHANGES

CANCEL

1

Audit Log

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 in upper right hand 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

The screenshot shows a web application interface for a client named Jody Smith. The top navigation bar includes links for PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, LOCATION, and REFERRALS. Below this is a section titled 'RELEASE OF INFORMATION'. The form contains the following fields:

- Permission:** A dropdown menu with 'Yes' selected.
- Start Date:** A date field showing '01/01/2016' with a calendar icon.
- End Date:** A date field showing '01/01/2023' with a calendar icon.
- Documentation:** A dropdown menu with 'Attached PDF' selected.
- File:** A button labeled 'Select File'.

At the bottom of the form are two buttons: 'ADD RECORD' and 'CANCEL'. A small footer note at the bottom left reads 'Managed with Clarify Human Services'.

- 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.

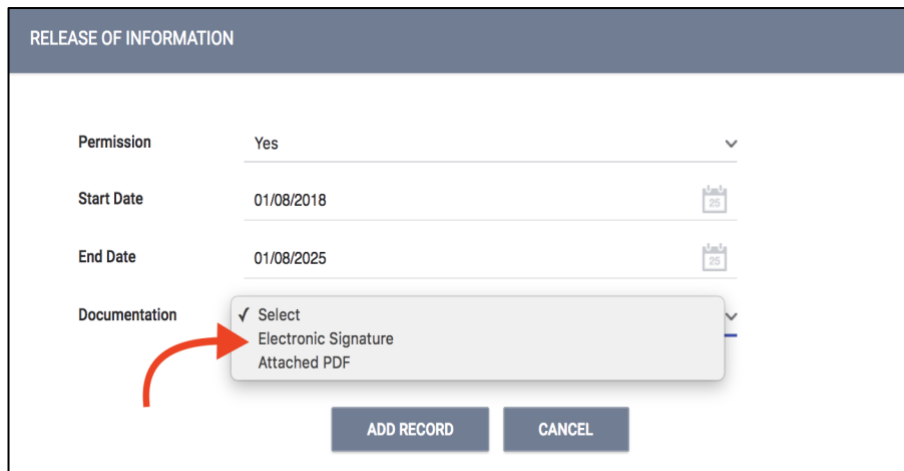
- Documentation for “Yes” Permissions (client giving consent):

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

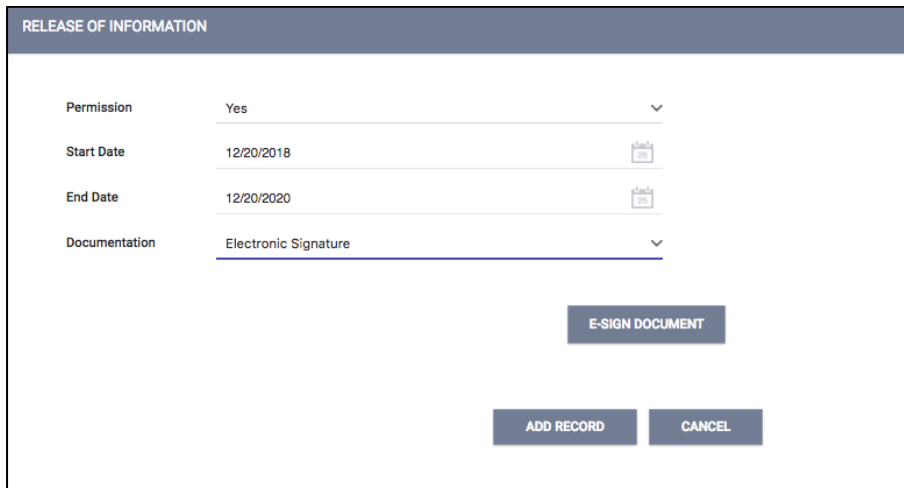
client, or have the client sign the electronic version (see further instructions below). Select “Add Record” once all steps are complete.

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" set to "Yes", "Start Date" set to "01/08/2018", and "End Date" set to "01/08/2025". The "Documentation" field is a dropdown menu that is currently open, showing three options: "Select" (with a checkmark), "Electronic Signature", and "Attached PDF". A red arrow points from the "Documentation" label to the "Electronic Signature" option. At the bottom of the form are two buttons: "ADD RECORD" and "CANCEL".



The screenshot shows the same "RELEASE OF INFORMATION" form, but now the "Documentation" dropdown menu is closed and "Electronic Signature" is selected. A new button, "E-SIGN DOCUMENT", has appeared below the "Documentation" field. The "ADD RECORD" and "CANCEL" buttons remain at the bottom.


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.

Important: Personal information is not entered in HMIS for people who are 1) receiving services from domestic violence agencies, 2) fleeing or in danger from domestic violence, dating violence, sexual assault or stalking situation, or 3) have revealed information about being HIV positive or having AIDS. If one of these situations applies to you, DO NOT agree to have your personal identifying information collected.

Signature:

RESET

APPLY



12/20/2018
Cathy Jones

SAVE

CANCEL

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.

RELEASE OF INFORMATION				ADD RELEASE OF INFORMATION (+)
Permission	Type	Start Date	End Date	
Yes Sarah Agency	Electronic Signature	12/04/2018	12/04/2020	

*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.

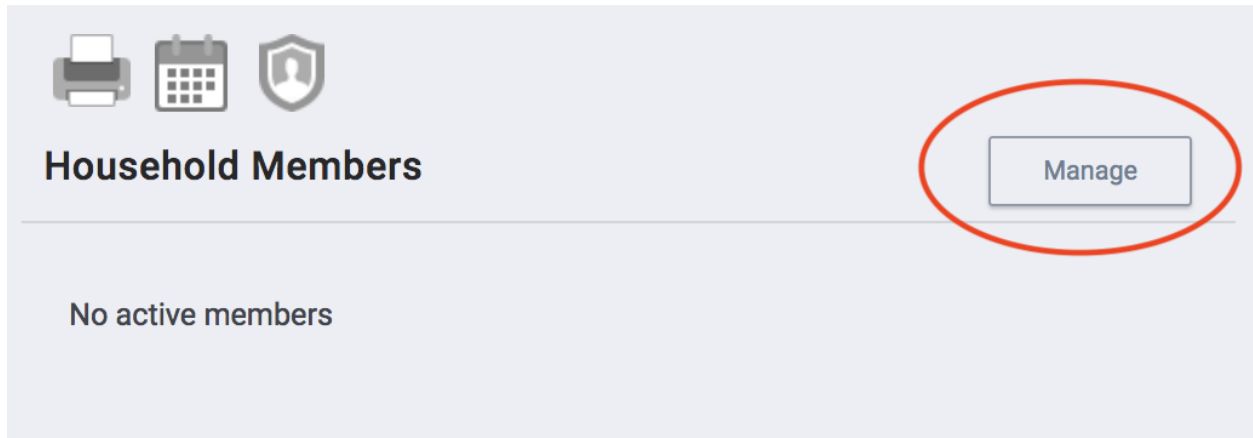
Note: On the Client Privacy screen, all records should maintain the default setting of "Public". King County operates a shared "open system", meaning that agencies can view all records within the system. The "Private" setting should never be used, as this is against system protocol.



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 right corner, under the header "Household Members," click "Manage."

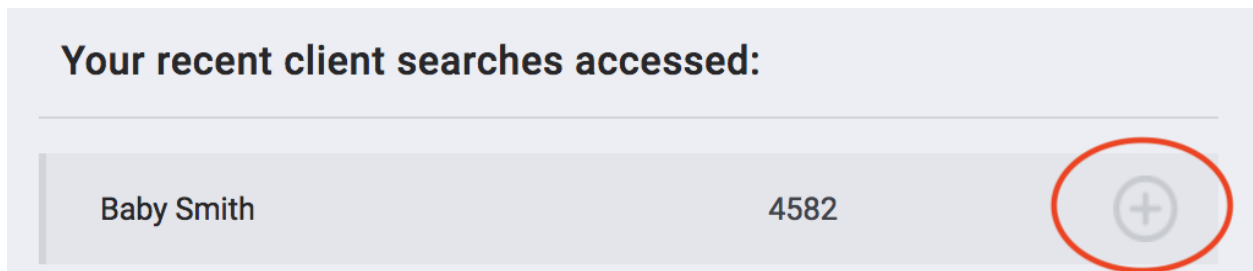


Household Members

No active members

Manage

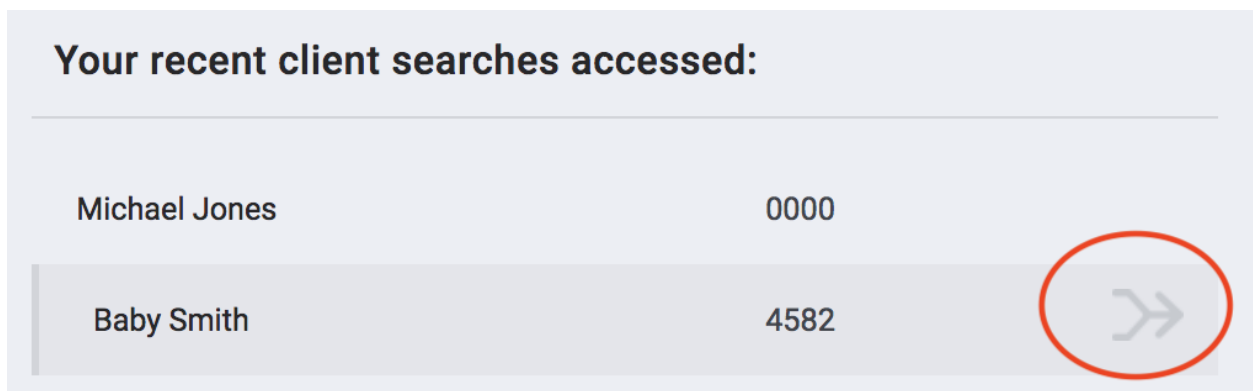
If you have recently accessed the family member files, they will be listed on the right side menu under the header "Your recent client searches accessed." If the family member is listed there, click the plus sign + to add them to the head of household's group.



Your recent client searches accessed:

Baby Smith	4582	+
------------	------	---

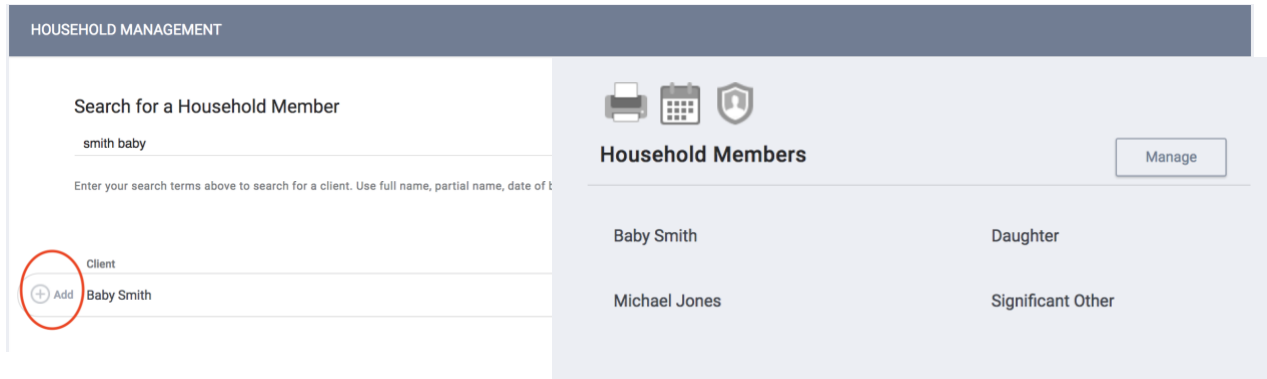
NOTE: When a listed client has "Join" as an option, that person is already part of an existing family/household group. Rather than adding them to your client's household, you are given the option of joining your head-of-household client to the existing group. Pay careful attention to the final results.






Your recent client searches accessed:

Michael Jones	0000	
Baby Smith	4582	>>

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



HOUSEHOLD MANAGEMENT	
Search for a Household Member smith baby <small>Enter your search terms above to search for a client. Use full name, partial name, date of birth</small>	<div>  </div> Household Members Manage
Client	
+ Add Baby Smith	

Household Members	
Baby Smith	Daughter
Michael Jones	Significant Other

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.

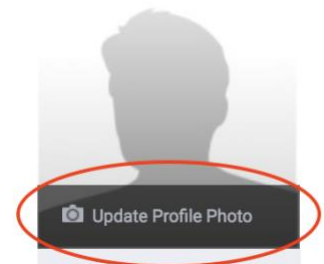
If a member leaves the household, clicking “Edit” from the Members list will allow you to enter an End Date to remove them from the group.

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 right section.
- 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.

Jody Smith	
PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES LOCATION REFERRALS	
CLIENT PROFILE	
Social Security Number	XXX-XX-6789
Quality of SSN	Full SSN Reported
Last Name	Smith
First Name	Jody
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	12/25/1970
Adult Age: 47	

UNIQUE IDENTIFIER
0DF7AB37D

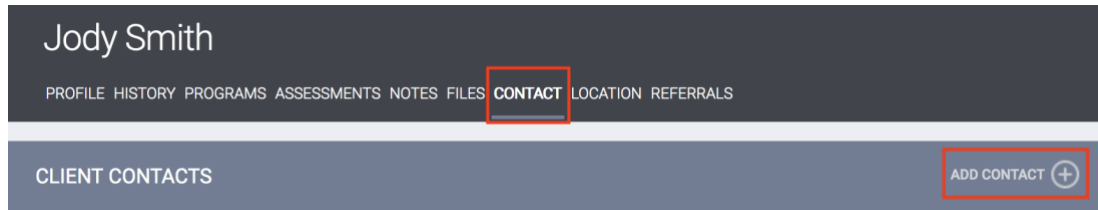
Another way is to take a photo using a webcam attached to your computer:

- From the Client Profile screen, select "Update Profile Photo" in the upper right section.
- Select either "Take a Picture Instantly" or "Take a Picture After 3 Seconds"
- 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."

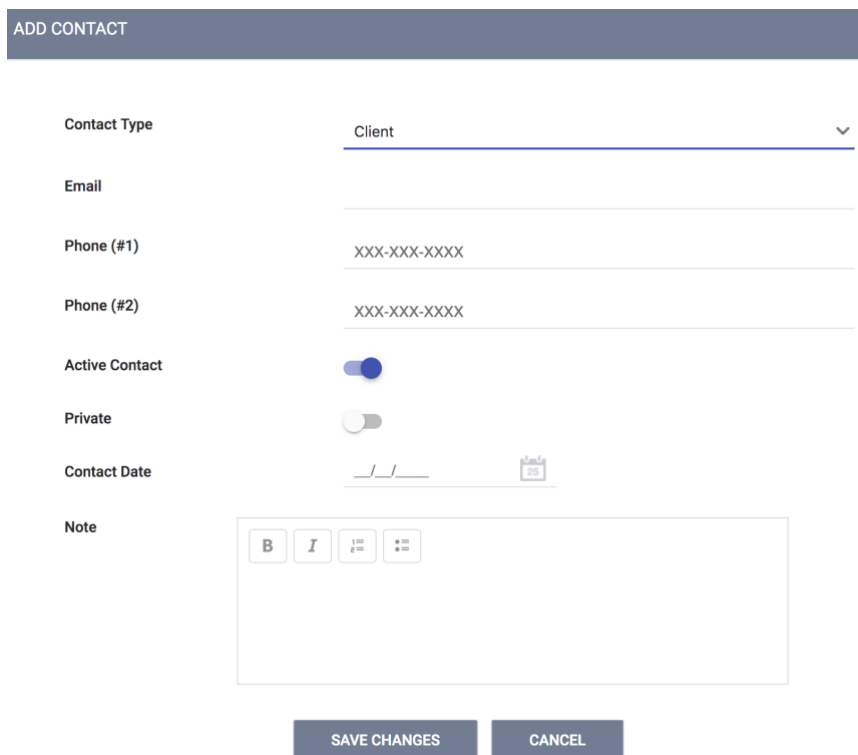


Jody Smith

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES **CONTACT** LOCATION REFERRALS

CLIENT CONTACTS **ADD CONTACT** +

2. Complete Contact information and click "Add Record."



ADD CONTACT

Contact Type Client


Email

Phone (#1) XXX-XXX-XXXX



Phone (#2) XXX-XXX-XXXX

Active Contact ☒

Private ☐

Contact Date 

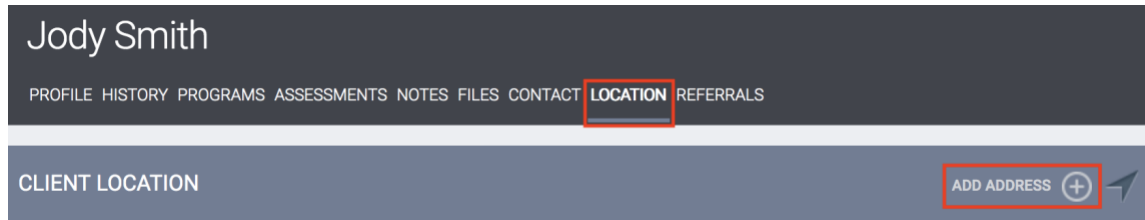
Note

B *I*  

SAVE CHANGES CANCEL

To add a client location or address:

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

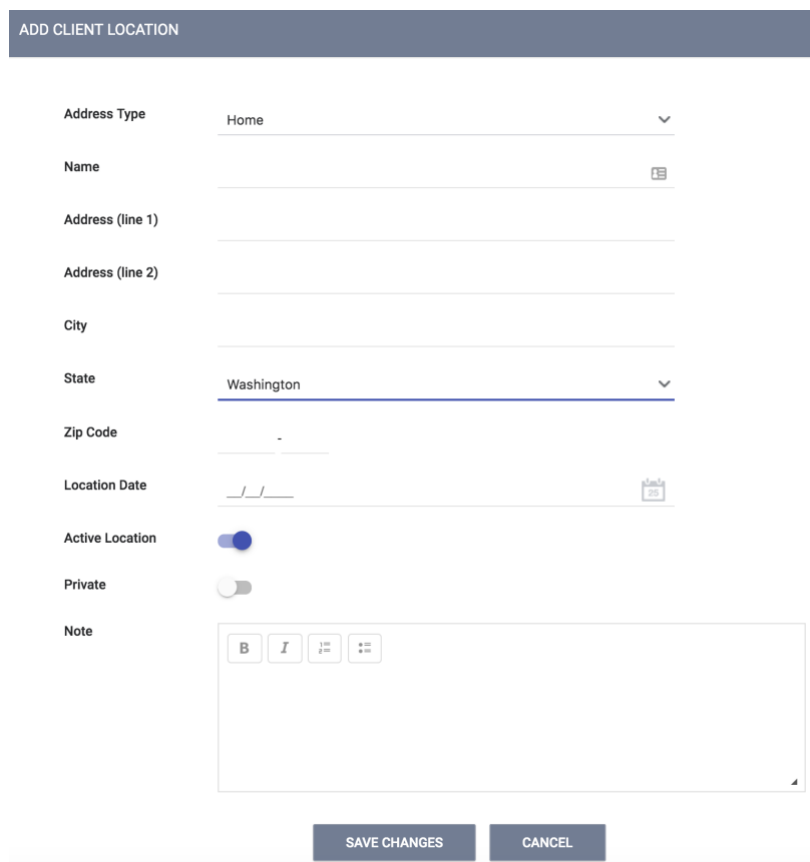


Jody Smith

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES CONTACT **LOCATION** REFERRALS

CLIENT LOCATION ADD ADDRESS +

2. Complete contact information and click "Save Changes."



ADD CLIENT LOCATION

Address Type: Home

Name:

Address (line 1):

Address (line 2):

City:

State: Washington

Zip Code: -

Location Date: / /

Active Location: ☒

Private: ☐

Note:

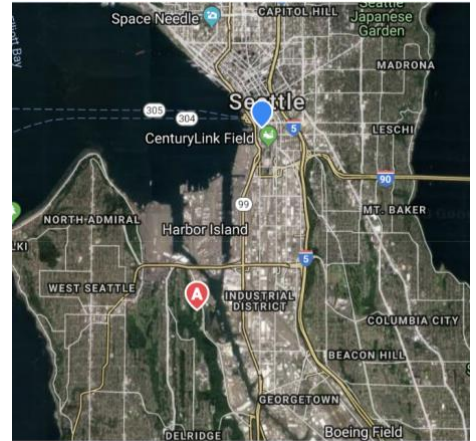
SAVE CHANGES CANCEL

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.

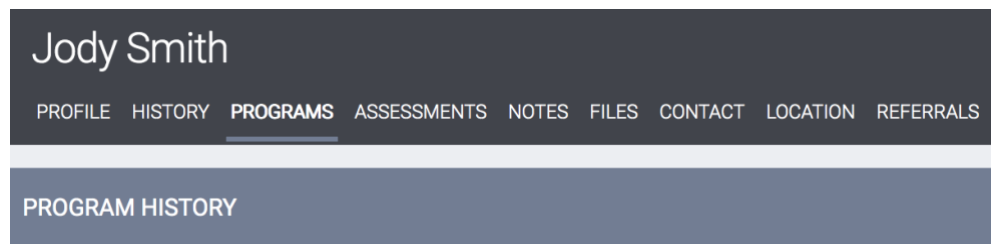
You will be notified at the top of the screen that your record has been saved.

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 "Enroll." In the example below, we are enrolling both Jody Smith and family members Michael Jones and Baby Smith. In this case, Jody Smith will become the Head of Household for the enrollment and the family members will become part of the Group Enrollment when we toggle to include them before clicking Enroll button.

The screenshot shows the 'Jody Smith' enrollment form. At the top is a dark header with the name 'Jody Smith' and a navigation bar with links: PROFILE, HISTORY, PROGRAMS (highlighted), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below the header is a section titled 'Day Center' with an upward arrow icon. The form is divided into several sections: 'Funding Source' with a puzzle piece icon and the text 'Other (N/A)'; 'Availability' with the text 'Full Availability'; 'Service Categories' with a list of checked items: 'No Category', 'VA SSVF Service', 'Case Management', 'Other', and 'Financial'; and 'Include group members:' with two toggle switches for 'Michael Jones' and 'Baby Jones', both of which are turned on. At the bottom of the form are two links: 'PRINT DIRECTIONS' and 'DOC REQUIREMENTS', and a large blue 'ENROLL' button on the right.

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 in the right side bar under "Program Group Members."

The screenshot shows a user interface for a client named Jody Smith. The top navigation bar includes links for PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The main content area is titled 'PROGRAM: DAY CENTER' and has tabs for Enrollment, History, Provide Services, Assessments, Notes, Files, and Forms. The 'Enrollment' tab is active, showing a 'Program Service History' section with the message 'There are no results to display'. On the right sidebar, there is a green box indicating '0 DAYS ACTIVE PROGRAM'. Below this, there are fields for 'Program Type: Group (3)', 'Program Start Date: 07/24/2019', 'Assigned Staff:', and 'Head of Household: Jody Smith' with a checkmark. At the bottom of the sidebar, under 'Program Group Members', there is a table listing two members: Michael Jones and Baby Jones, both with a start date of 07/24/19 and status 'Active'.

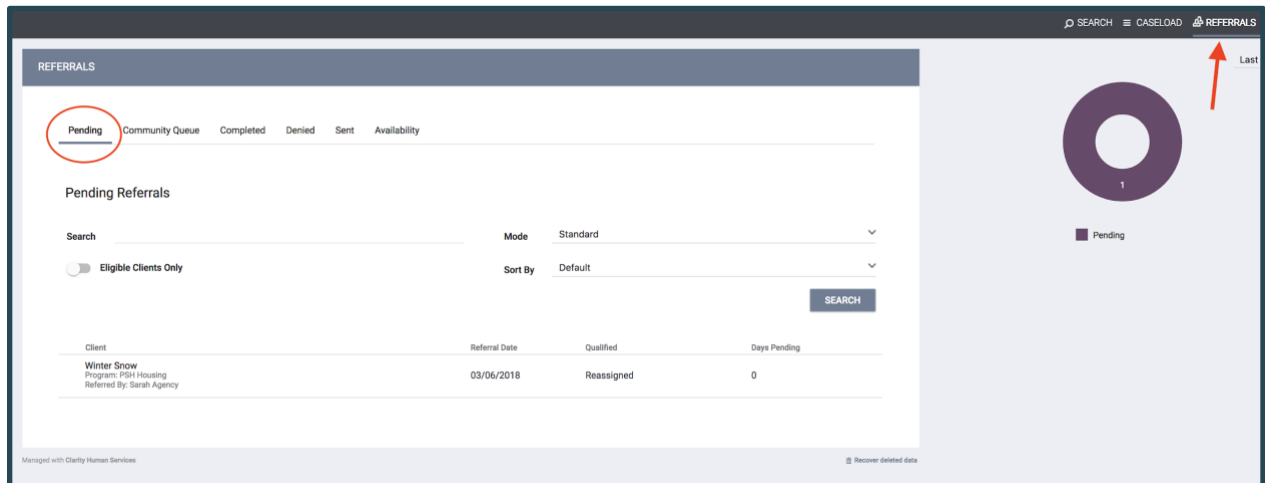
Program Group Members		
Michael Jones	07/24/19	Active
Baby Jones	07/24/19	Active

Coordinated Entry Program Enrollment

More information and updates can be found on the [King County Coordinated Entry System \(CES\) website](http://kingcounty.coordinatedentry.org).

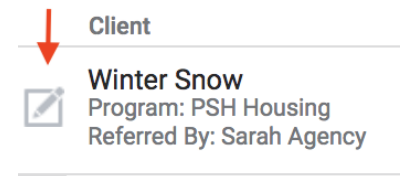
HMIS is used as part of the Continuum of Care's CES system in accordance with the [CES Policies and Procedures](#), and aligned with the HMIS Data and Technical Standards at (CoC Program interim rule) 24 CFR 578.7(a)(8).

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

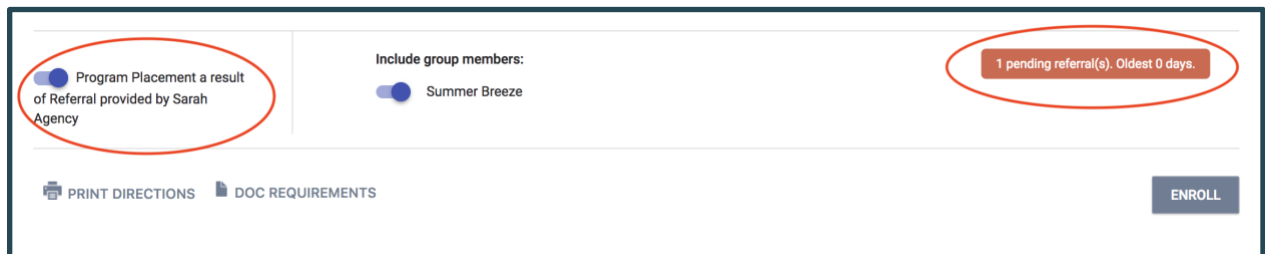


To enroll a client from the Pending tab of the Referrals section, select the Client Name (e.g. Winter Snow).

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 the client name will take you to the Profile screen of the client record. Go to the Programs tab and select the down arrow of 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.



10. Entering Services

When all Enrollments are complete, the “Provide Services” page will appear for your main client (head of household).

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. Verify that the proper funding source is selected (if applicable) and select any group members who should also receive this service.

Click “Submit” to complete the service placement. In the example above, we have provided only the head of household with [Day Center] Bus Fare.

PROGRAM: DAY CENTER

Enrollment History **Provide Services** Assessments Notes Files Forms × Exit

Services

[Day Center] Bus Fare No Category ^

[Day Center] Bus Fare

Start Date: 07/24/2019 23 End Date: 07/24/2019 23

Expense Amount: 0.00 Expense Date: 07/24/2019 23

Funding Source: No Funding Source ▼

Include group members:

☐ Michael Jones

☐ Baby Jones

Service Note

B I 100 200 300 400

SUBMIT


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:

PROGRAM: DAY CENTER

Enrollment **History** Provide Services Assessments Notes Files Forms ✕ Exit

Program Service History

Service Name	Start Date	End Date
[Day Center] Bus Fare:[Day Center] Bus Fare Sarah Agency	07/24/2019	07/24/2019 

☒ Reservation ☐ Service ☐ Referral

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 the Edit icon.

Select "Provide Services" and follow the above steps for entering Services.

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.

PROGRAM: PSH HOUSING

Enrollment History Provide Services Assessments Notes Files Chart Forms x Exit

Program Service History LINK FROM HISTORY

There are no results to display

Managed with Clarity Human Services

393 Active Program

Program Type: Group (3)
Program Start Date: 02/06/2017
Assigned Staff: Stacy Holmes [x]
Head of Household: Michael Jones [x]

Program Group Members

Baby Smith	02/06/17	Active
Jody Smith	02/06/17	Active

Status Assessments +

Assessment Due - February 6th 2018

No statuses

Assessment due every year Notification: OFF [x]

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.

ADD PROGRAM ASSESSMENT x

<input checked="" type="checkbox"/>	Michael Jones	Significant Other
<input checked="" type="checkbox"/>	Baby Smith	Daughter
<input checked="" type="checkbox"/>	Jody Smith	Mother

ADD STATUS ASSESSMENT ADD ANNUAL ASSESSMENT

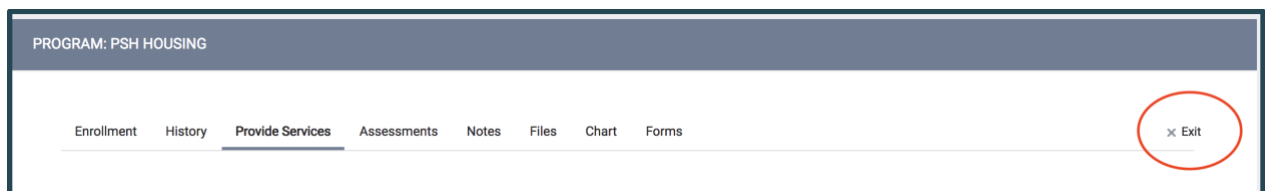
Completed assessments can be viewed and/or edited from the right side menu.

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.

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

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

The screenshot shows a web interface for a program named 'PROGRAM: PSH HOUSING'. At the top, there is a dark blue header bar with the program name. Below this is a white navigation bar with several tabs: 'Enrollment', 'History' (which is currently selected and underlined), 'Provide Services', 'Assessments', 'Notes', 'Files', 'Chart', and 'Forms'. On the far right of the navigation bar, there is a link that says 'x Exit'.

- 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
- Provide 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

Right side menu of the Program page:

Current program status, type and start date.

Assigned Staff and Head of Household

List of current group members with option to add new members or edit existing.

Option to add Assessments or edit/view existing.

The screenshot shows the right side menu of the Program page. At the top, there is a green banner that says '18 DAYS ACTIVE PROGRAM'. Below this is a table with program details:

Program Type:	Group (2)
Program Start Date:	08/01/2015
<input checked="" type="checkbox"/> Assigned Staff:	Robert Herdzik
<input checked="" type="checkbox"/> Head of Household:	Michael Jones

Below the table is a section titled 'Program Group Members'. It contains a list of members:

Carl Dormer	08/01/15	Active
-------------	----------	--------

Below the list is a section titled 'Status Assessments' with a plus icon. It contains the text 'No statuses' and 'Annual Assessment due every year'. At the bottom, there is a notification status: 'Notification: ON' with a green checkmark icon.

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.

Jody Smith

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

HISTORY

Advanced Search Options View ▾

Service Name	Start Date	End Date
Day Center Sarah Agency	07/24/2019	Active
[Day Center] Bus Fare:[Day Center] Bus Fare Sarah Agency	07/24/2019	07/24/2019

Programs the client has been or is currently enrolled in will appear in a light yellow/beige color to separate them from service transactions.

Service transactions with attached expenses are marked with a comment icon at the right of the listing. Hover your mouse over the icon, and additional financial details are displayed. This includes the total expense amount, and the funding source the expense was applied to.

If your client has a very large history spanning multiple pages of results, you can click on “view/hide” to display or hide advanced search options. The advanced search options allows 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

HISTORY

Advanced Search Options Hide ▲

Search

Category Any category ▾ Agency Any agency ▾

Start Date End Date

Type Any type ▾


Clear SEARCH

- 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

By clicking the Edit icon to the left of a service name you will be able to add service notes, adjust dates, add additional expenses, and add household members. Clicking the Edit icon on a Program will place you directly into Program management.

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.



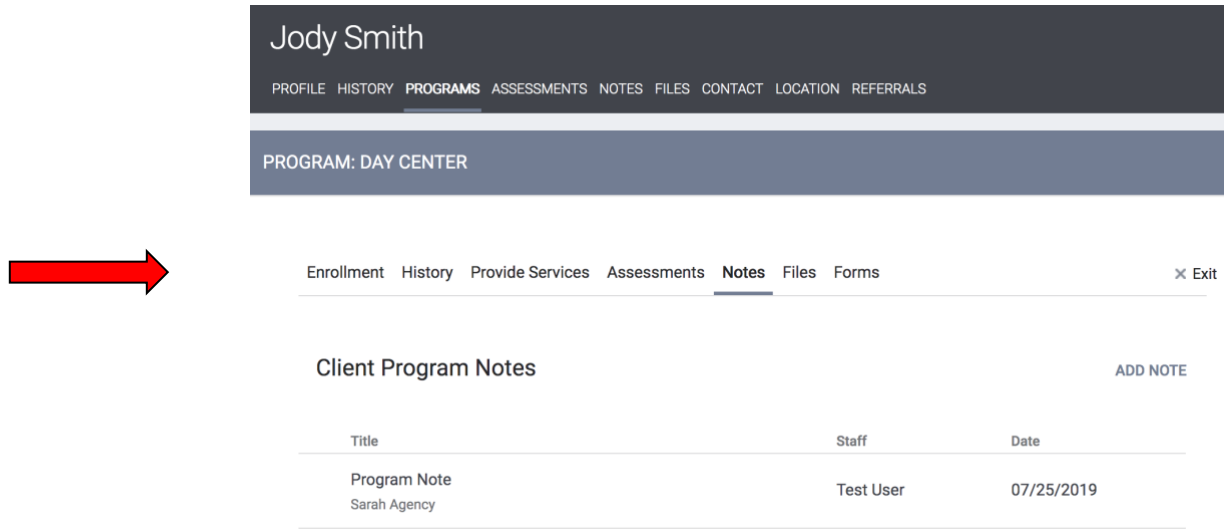
Jody Smith

PROFILE HISTORY PROGRAMS ASSESSMENTS **NOTES** FILES CONTACT LOCATION REFERRALS

CLIENT NOTES ADD NOTE (+)

Title	User Full Name	Date
Client Note Sarah Agency	Test User	07/25/2019
Program Note Sarah Agency	Test User	07/25/2019 

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

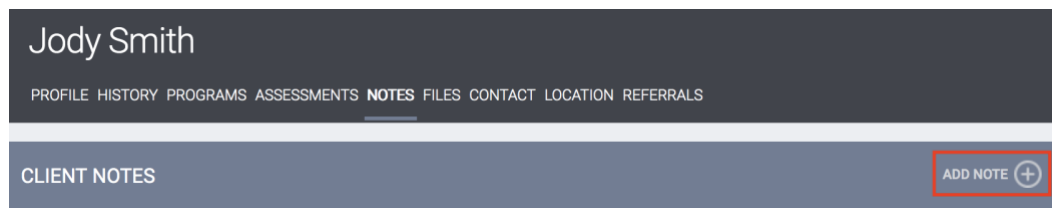


The screenshot shows the client profile for Jody Smith. The top navigation bar includes links for PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a blue bar indicates the PROGRAM: DAY CENTER. A secondary navigation bar contains links for Enrollment, History, Provide Services, Assessments, Notes, Files, and Forms, with an 'Exit' button on the right. A red arrow points to the 'Notes' tab. Below the navigation bar, the section is titled 'Client Program Notes' with an 'ADD NOTE' button in the top right corner. A table lists existing notes:

Title	Staff	Date
Program Note Sarah Agency	Test User	07/25/2019

To add a client note, click on the Notes tab in the client file.

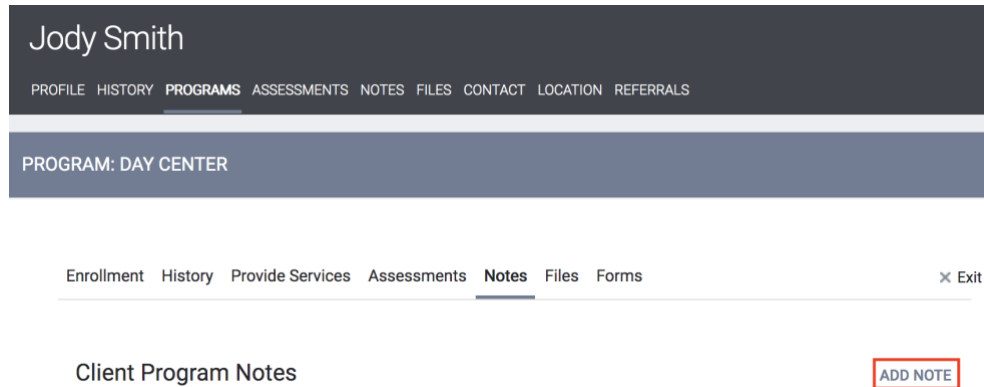
In the upper right corner, click on "Add Note."



This screenshot shows the same client profile for Jody Smith, but with the 'NOTES' tab selected in the top navigation bar. The 'CLIENT NOTES' section is visible at the bottom, and the 'ADD NOTE' button with a plus icon is highlighted with a red box.

Enter the Title, Date and Body of your note and click "Add Record" to save.

To enter a program note, open the relevant enrollment, click the Notes tab, and then select "Add Note."



Jody Smith

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: DAY CENTER

Enrollment History Provide Services Assessments **Notes** Files Forms × Exit

Client Program Notes ADD NOTE

Enter the Title, Date and Body of your note and click “Add Record” to save.

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 “Add File” in the upper right corner.



Title	Agency	Staff	Date
Home Visit Notes	Volunteers of America	Tauri Royce	2012-03-15
Edit Intake Note	Volunteers of America	Tauri Royce	2012-03-14

PROGRAM: PSH HOUSING

Enrollment History Provide Services Assessments Notes **Files** Chart Forms X Exit

Client Program Files

LINK FROM FILES **ADD FILE**

There are no results to display

Select a category and name from the drop down menus that most closely resembles the type of file you are uploading.

UPLOAD A FILE

Category Family, Social and Legal

Name Alimony Agreement

File

Select File

Custody Agreement.png (160.54KB) X

Trouble attaching files? Switch to the Basic Uploader

ADD RECORD CANCEL

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 "Add Record" 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.

Jody Smith

PROFILE HISTORY PROGRAMS ASSESSMENTS NOTES **FILES** CONTACT LOCATION REFERRALS

CLIENT FILES

ADD FILE +

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.

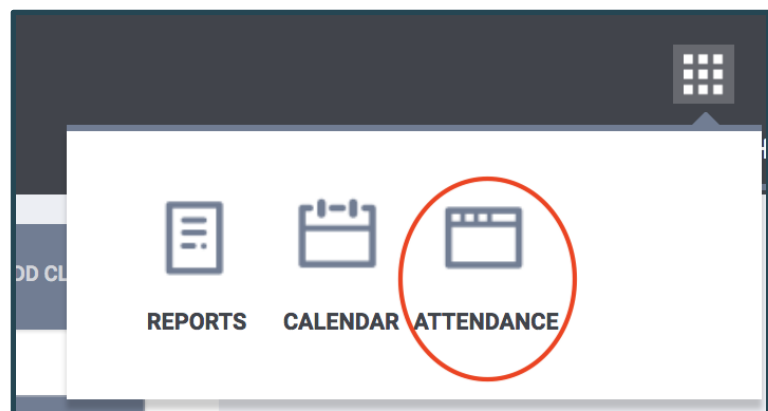
You can view the existing file simply by clicking View, or edit the document by uploading a new version.

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

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 provided.

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

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

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	
<input checked="" type="checkbox"/> Forest, Joey	11/24/2017	6262	Not Enrolled
<input checked="" type="checkbox"/> Forest, Leaf	07/04/1975	3873	Added
<input checked="" type="checkbox"/> 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.

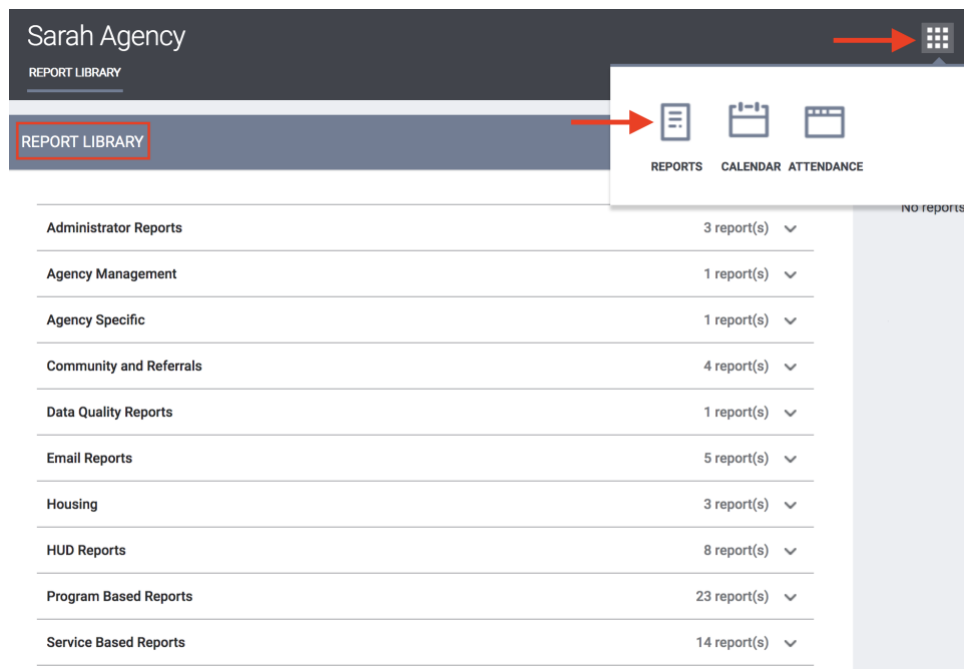
If your agency is using a scanner to enter clients into service via scan cards, use the Scanned button to upload your data file.



18. Reporting

Accessing the Report Library

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

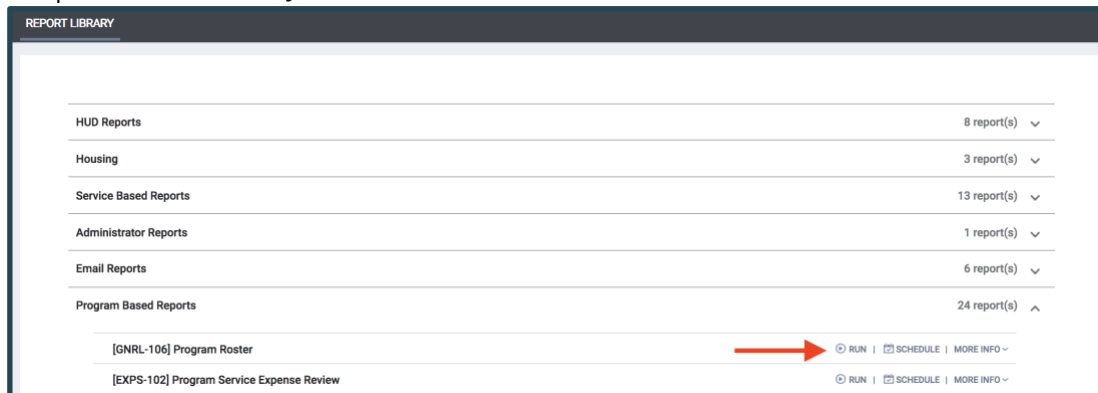


This will bring you to the Report main screen, which is divided into several sections according to report type, with Show/Hide features for easy organization. The report section

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) Choose...
All
Bridge Rapid Re-Housing Sarah Agency
Bridge Transitional Housing Sarah Agency
CE Project

Status Choose...

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

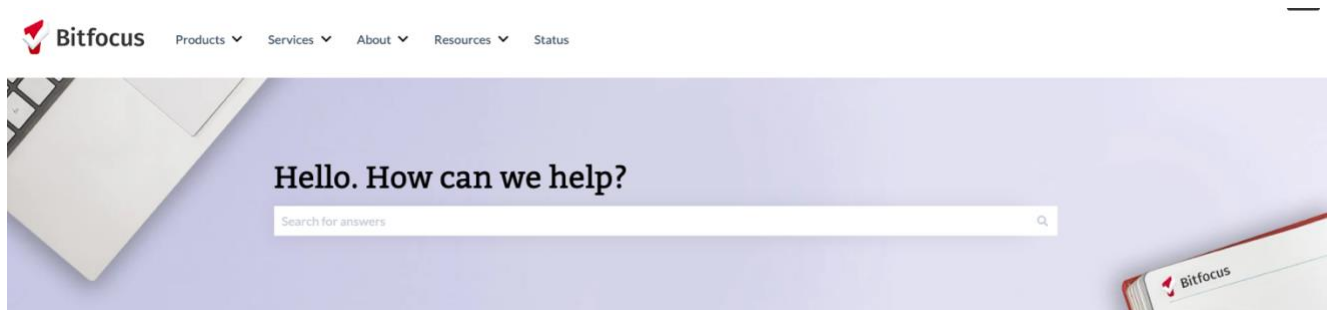
[close all]

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?](#)