HMIS End User Manual

King County

Homeless Management Information System

(206) 444.4001 x2

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

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Updated November 2023

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.

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 (*i.e jsmith*), but 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@mpleP12 (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.

The following web browsers are supported by Clarity:

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

Client Consent & Notification

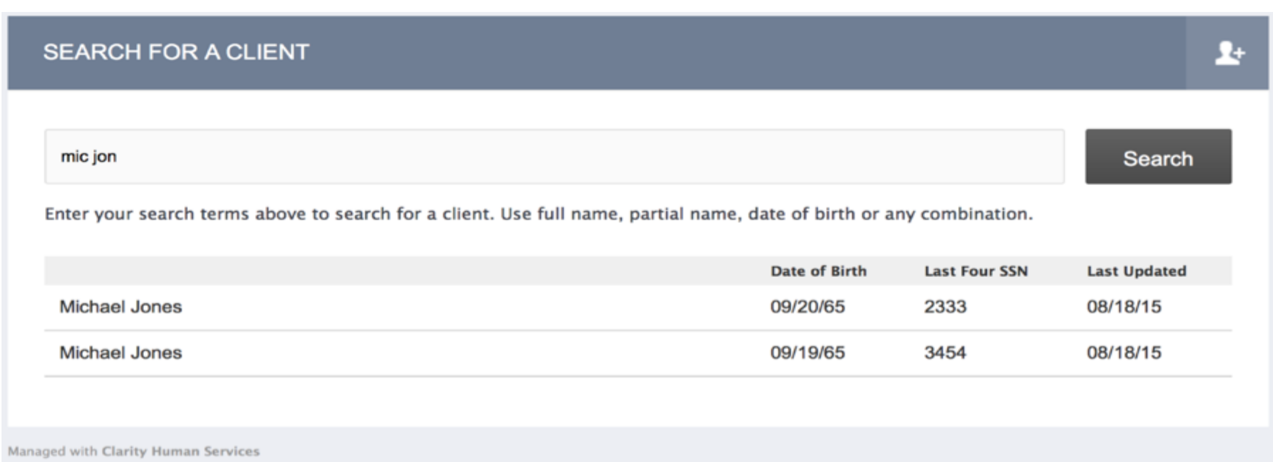
- Clients MUST be given a notification form that explains HMIS and why their personal information is being collected.
- Clients MUST also be given a consent form (Also known as the Release of Information, or ROI), which they must sign and agree to before any personally identifying information is entered.
  - *Please note, the ROI can be collected in Clarity Human Services electronically , or via the paper form linked above.*
- Every location that HMIS Intake is being done requires a clearly visible HMIS Privacy Statement Desk Sign.

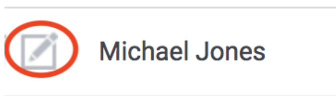
Searching for a Client

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.
  - We recommended searching by the first 3 letters of the clients first name, and the first 23 letters of the clients last name as depicted in 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).

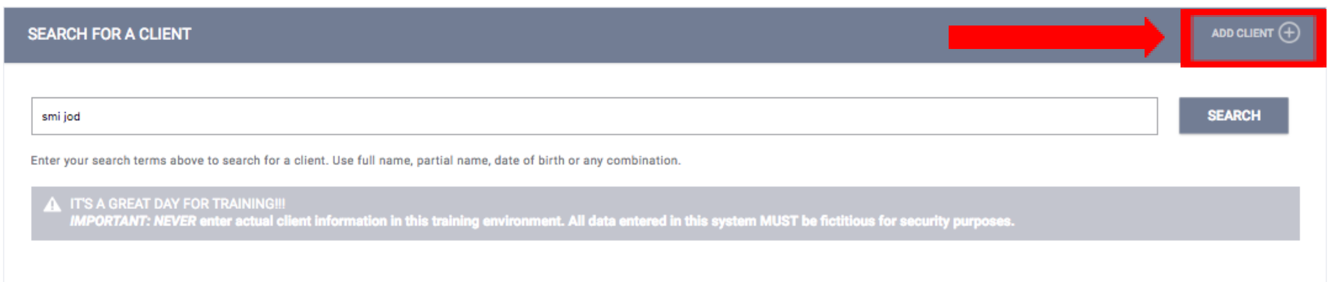




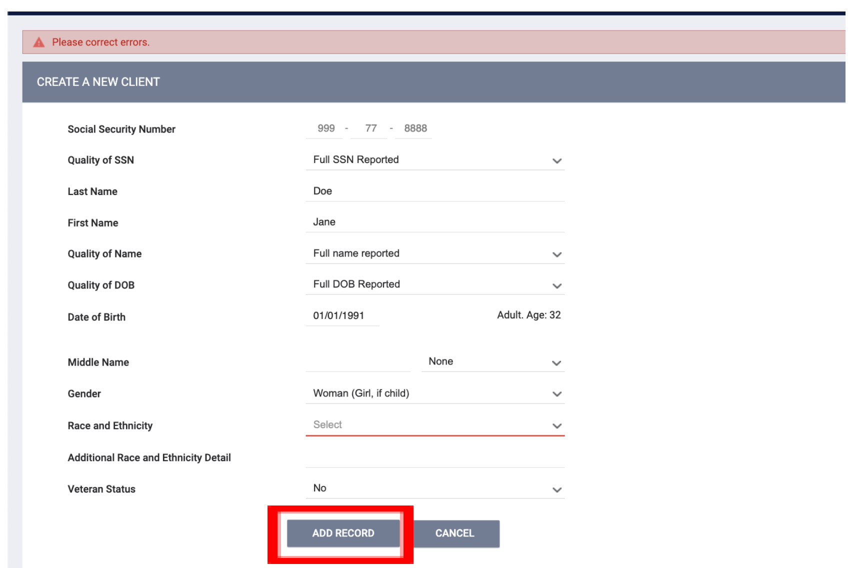
To select a client from your search results, mouse over the client you would like to select to produce an "Edit" option. Click on "Edit" to open the client file.

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.



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.

Be sure to review your intake to ensure accuracy and completeness.

Don’t Know/Client Prefers Not To Answer/Data Not Collected

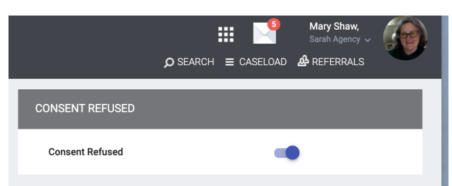
Selecting “Don’t Know," “Client Prefers Not to Answer", or “Data Not Collected” is permitted and will allow you to save the file. However, each field on this screen makes up the overall data quality percentage for this client. Selecting “Don’t Know," ““Client Prefers Not to Answer" or “Data Not Collected”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

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.

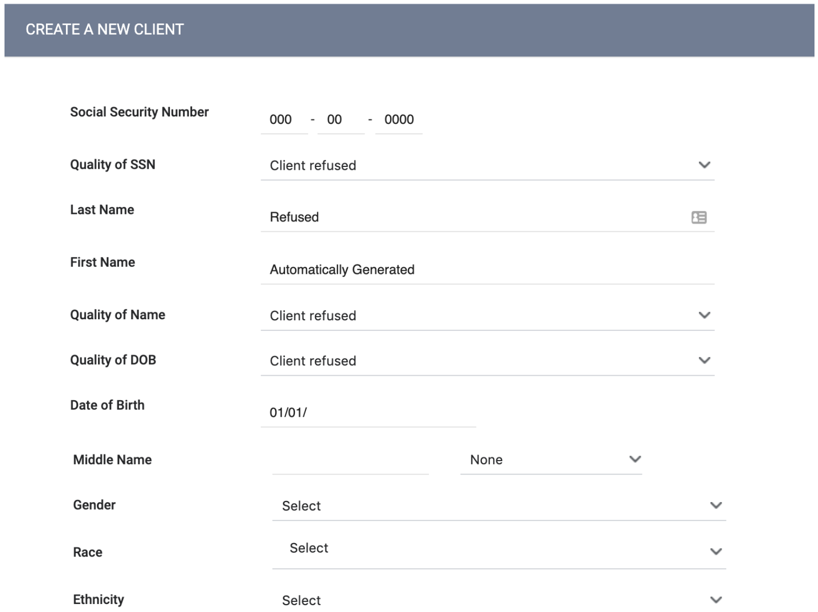
In the event that a client refuses consent to have personal information stored in HMIS, the client’s consent should be entered as “No” (located behind the Client Privacy Shield) and the consent refused/de-identified data entry protocol should be followed as described below. If one member of a household 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:

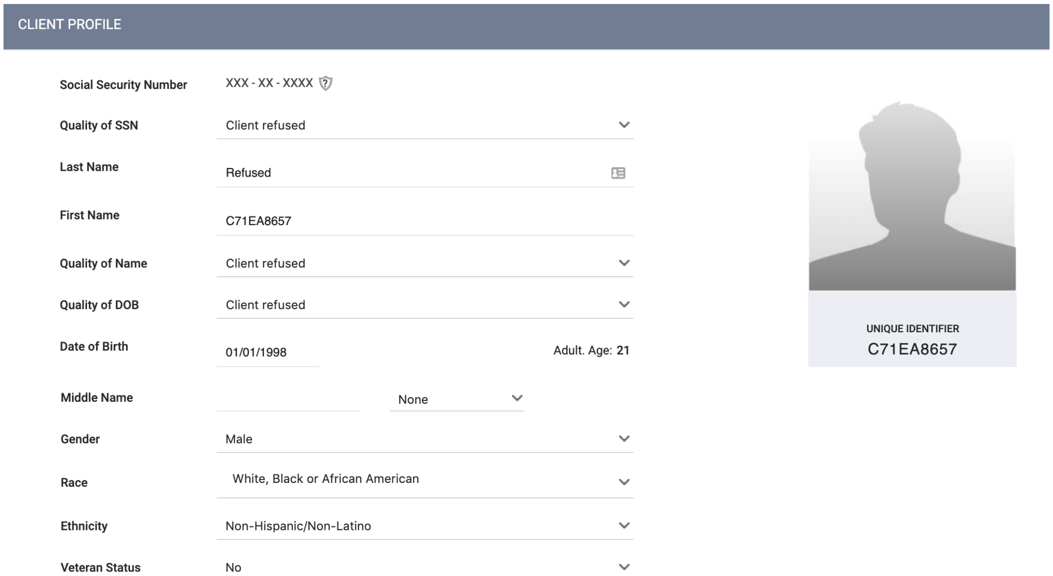
1. From the search screen, click “Add Client”
2. Click on the “consent refused” slider button to the right of the profile. The SSN, Name and Month and Day of Birth fields will be automatically filled with non-identifying values:



CREATE A NEW CLIENT

Social Security Number	000 - 00 - 0000
Quality of SSN	Client refused
Last Name	Refused
First Name	Automatically Generated
Quality of Name	Client refused
Quality of DOB	Client refused
Date of Birth	01/01/
Middle Name	None
Gender	Select
Race	Select
Ethnicity	Select

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. 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
6. 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	XXX - XX - XXXX
Quality of SSN	Client refused
Last Name	Refused
First Name	C71EA8657
Quality of Name	Client refused
Quality of DOB	Client refused
Date of Birth	01/01/1998 Adult. Age: 21
Middle Name	None
Gender	Male
Race	White, Black or African American
Ethnicity	Non-Hispanic/Non-Latino
Veteran Status	No

UNIQUE IDENTIFIER
C71EA8657

If a client profile has already been created before the Release of Information is refused, 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 it contains the de-identified values in the example above, including replacing the first name value with the Client ID number.

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.

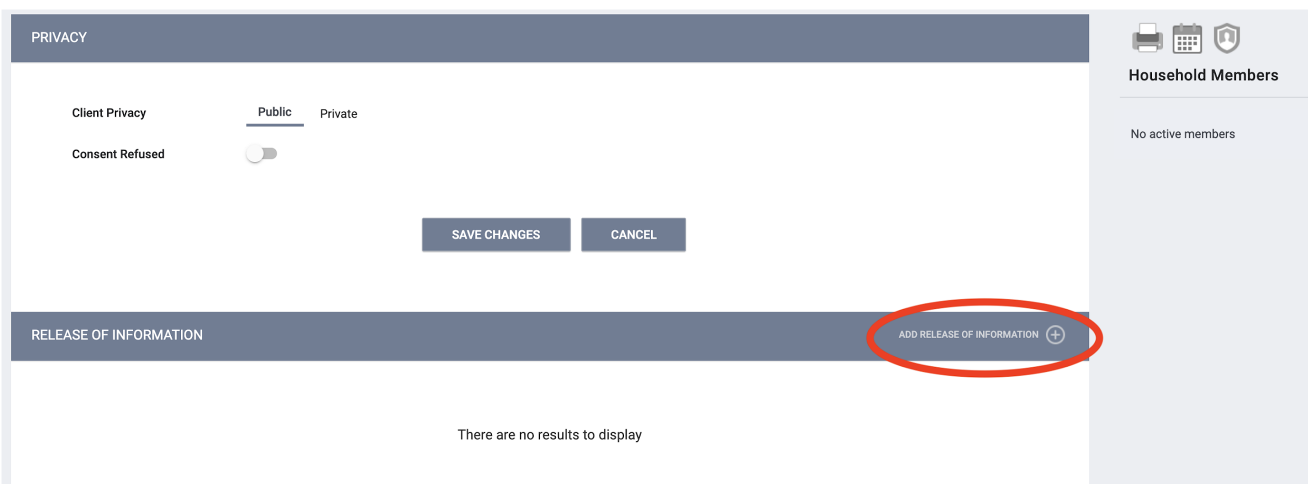
Note: Client identity could be determined through the identities and relationships of family members. Therefore all members of a family must be deidentified if consent is refused for any one member.

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.

1. To document client consent click on the Client Privacy Shield located in the upper right hand side of the client profile screen.

2. Click Add Release of Information:

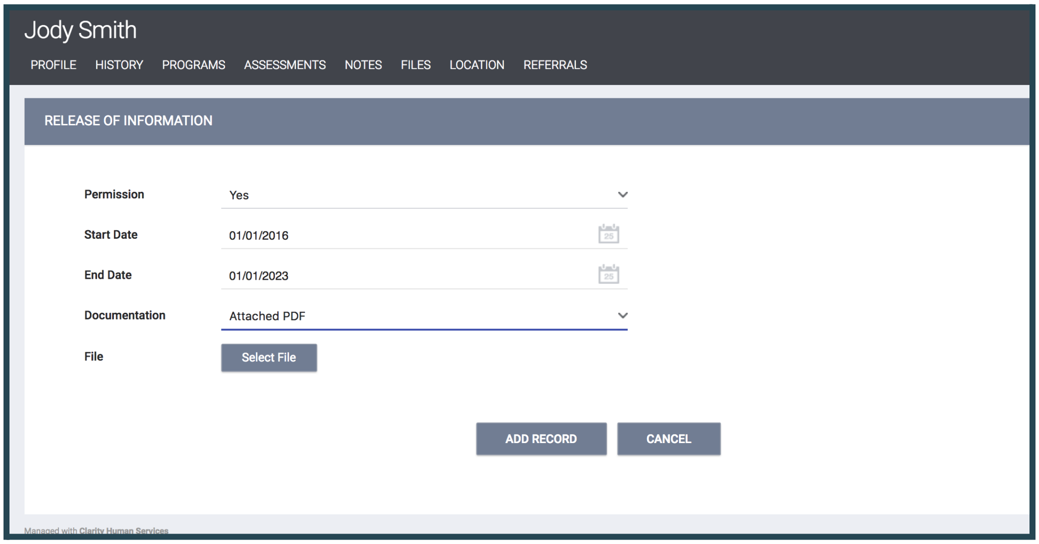


3. Select Yes to document consent:

   Permission

   Yes = Client provided consent

   No = Client did not provide consent



- 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

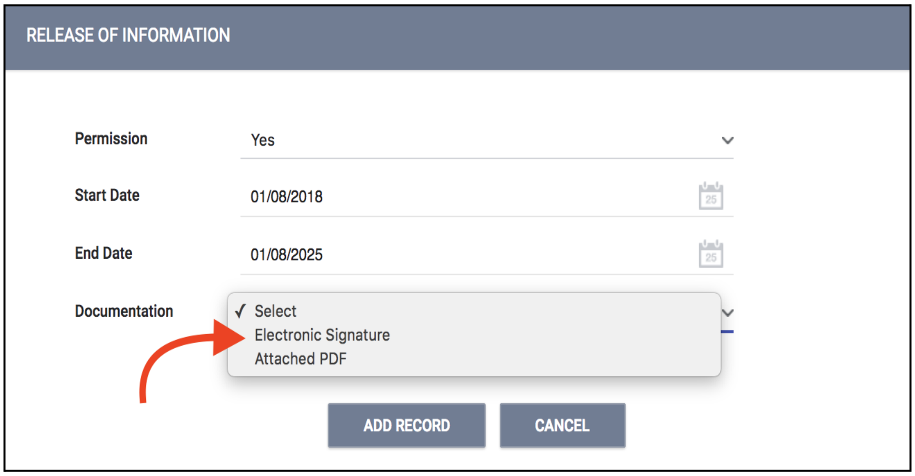
  For Yes, this is the date that the ROI will expire. It will default to the expiration date configured by the HMIS System Administrator, which is 7 years for King County HMIS.

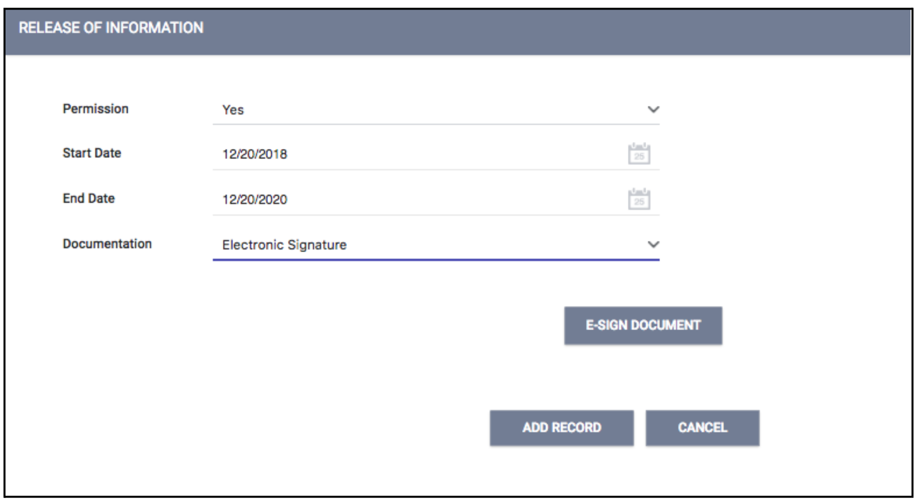
- Documentation for "Yes" Permissions (client giving consent):

  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.

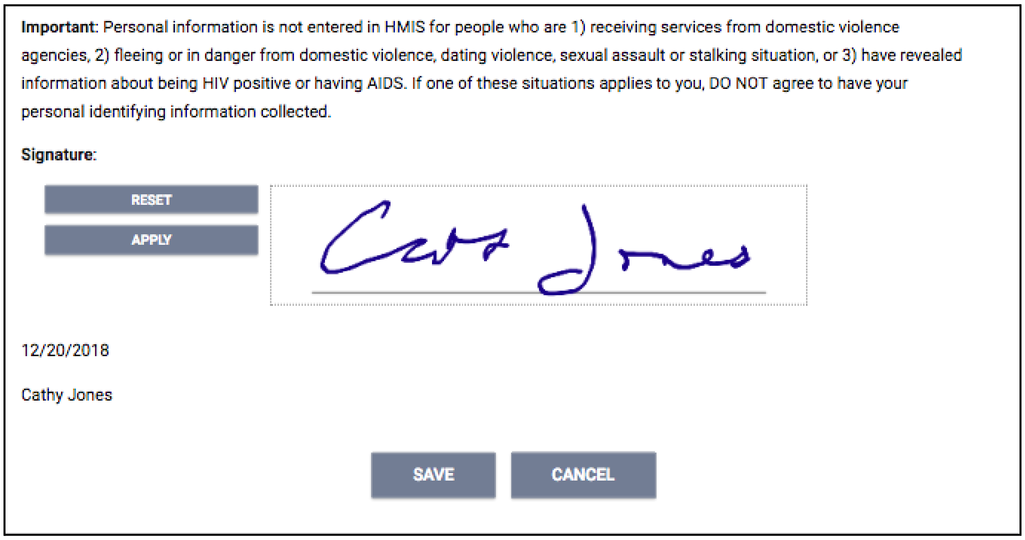
For Electronic Signature:

1. Select "Electronic Signature" you'll be prompted to have your client e-sign their ROI:

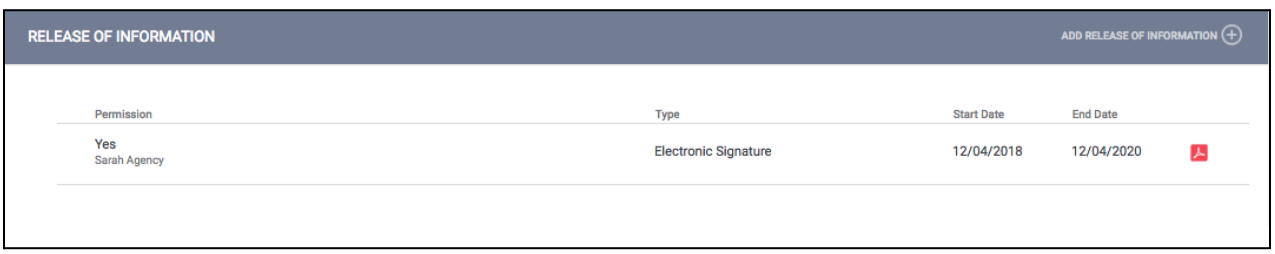




2. Click the "E-Sign Document" button and the ROI form will display. At this point you can share your device with the client, allowing them to scroll through and read the ROI, and then sign at the bottom. They can sign using a touch screen or using a mouse.



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.



*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.

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

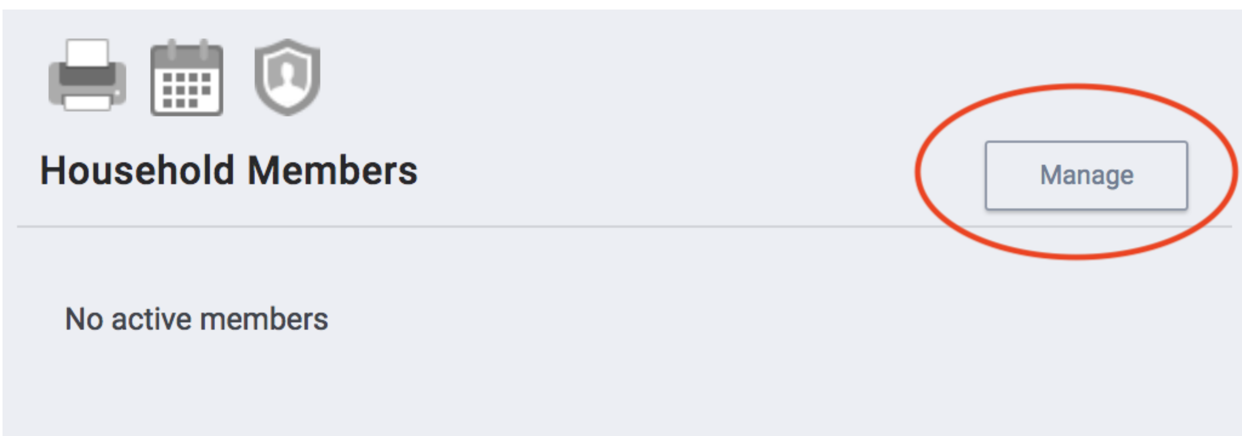
that all protocols are being followed and/or may direct you to work with Coordinated Entry Entry for All if your client has been assessed for housing through coordinated entry.

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.

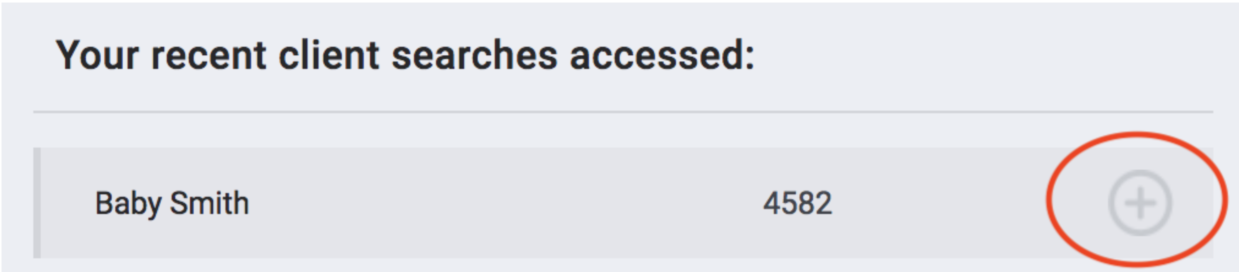
If you have questions regarding ROIs, please see the ROI Frequently Asked Questions document on the King County HMIS Forms & Guides page (https://kingcounty.bitfocus.com/kc-client-forms)

Creating Family/Household Groups

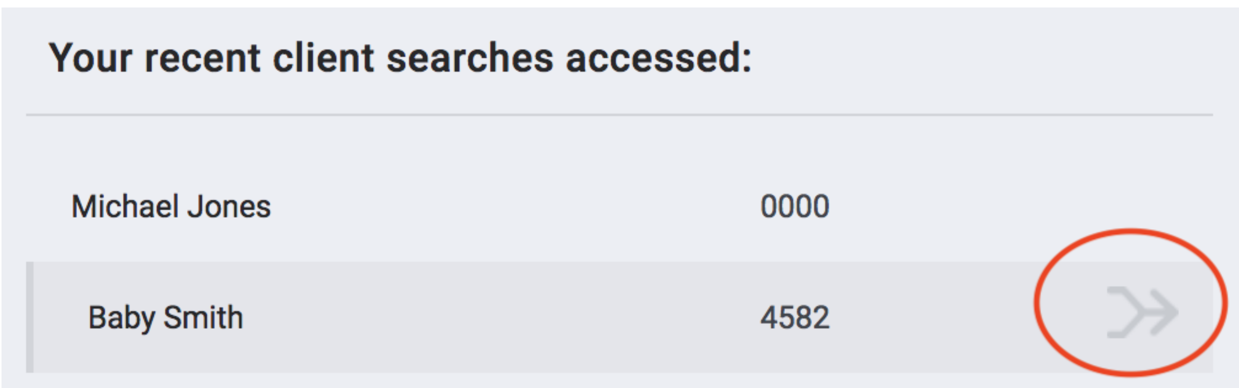
Begin by verifying that each family/household member exists in HMIS. If they do not, complete the above steps for "Adding A New Client" to create a file for each member. Open the profile for the **head of household**. In the upper right corner, under the header "Household Members," click "Manage."



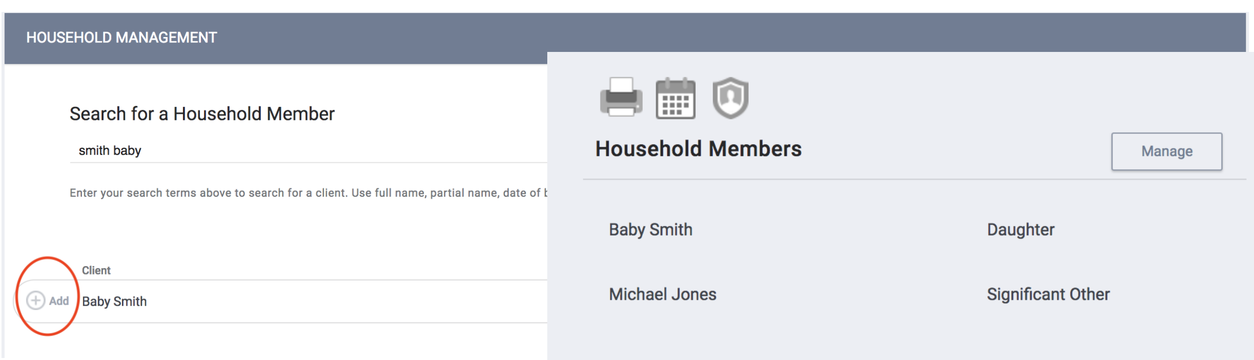
If you have recently accessed the family member files, they will be listed on the right side menu under the header "Your recent client searches accessed." If the family member is listed there, click the plus sign + to add them to the head of household's group.



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.



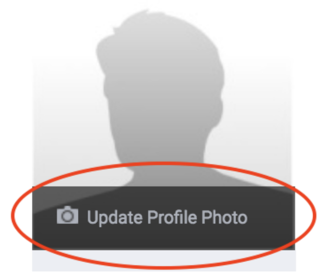
Complete the same steps for each member until all clients are listed in the Family/Household Members section in the upper right corner of your screen.

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.

Adding A Client Photo

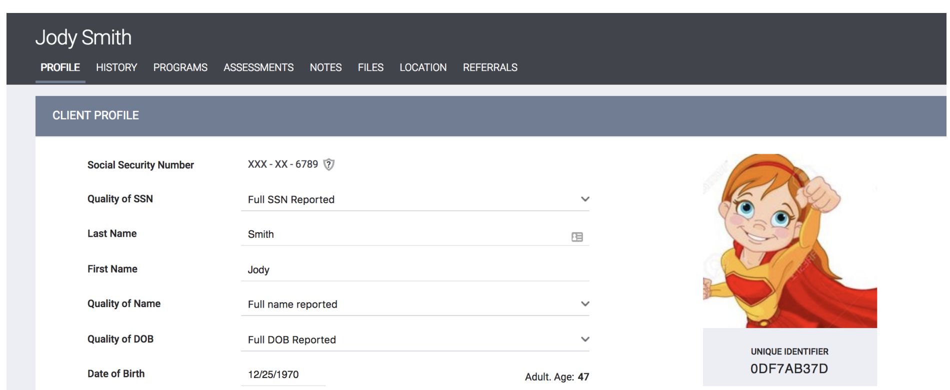
Uploading photos to your client files can provide a quick method of identification.



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.



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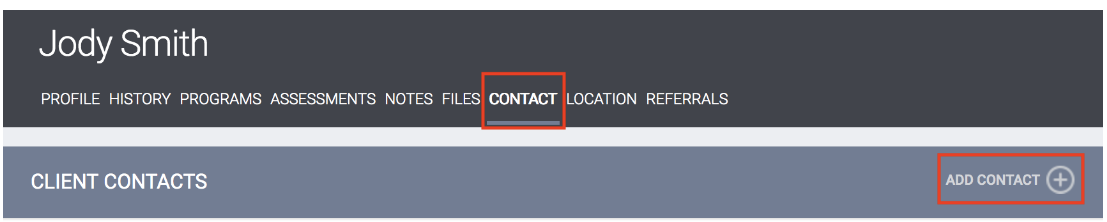
Another way is to take a photo using a webcam attached to your computer:

- 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.

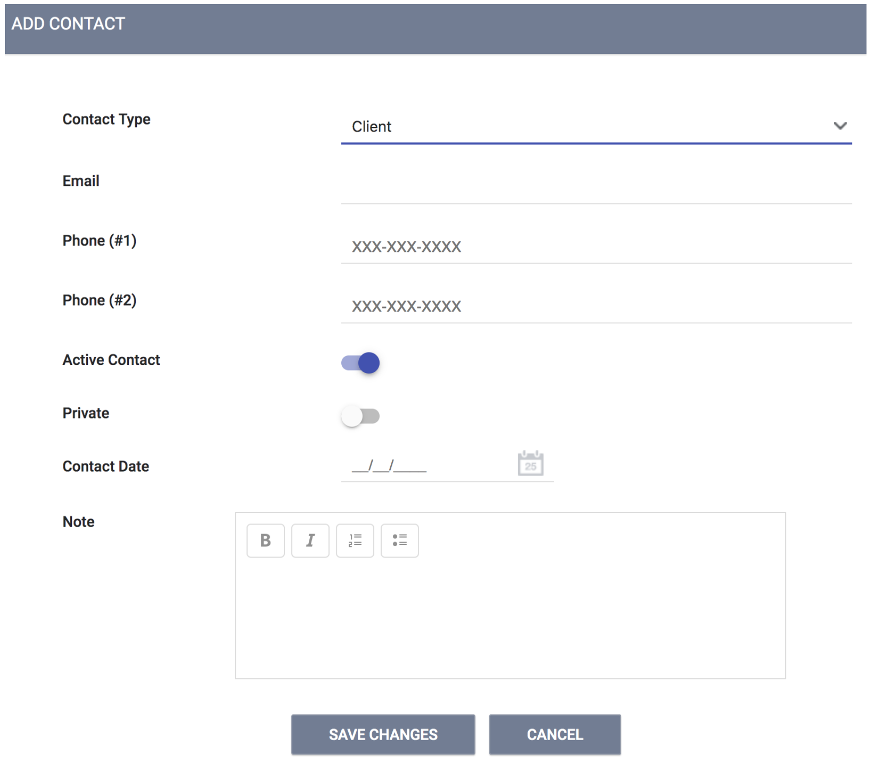
Adding Address & Contact Information

To add client contact information:

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

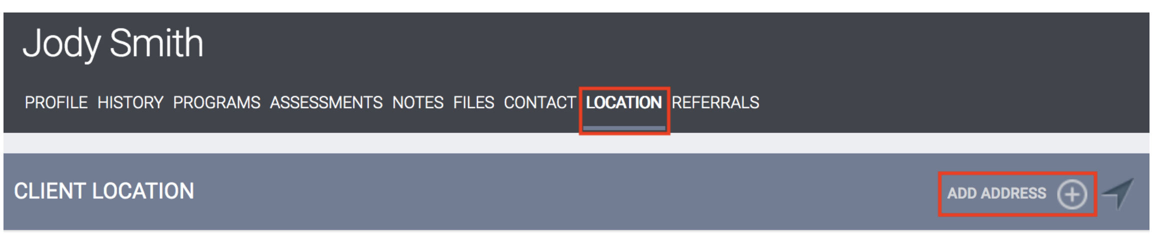


2. Complete Contact information and click "Add Record."

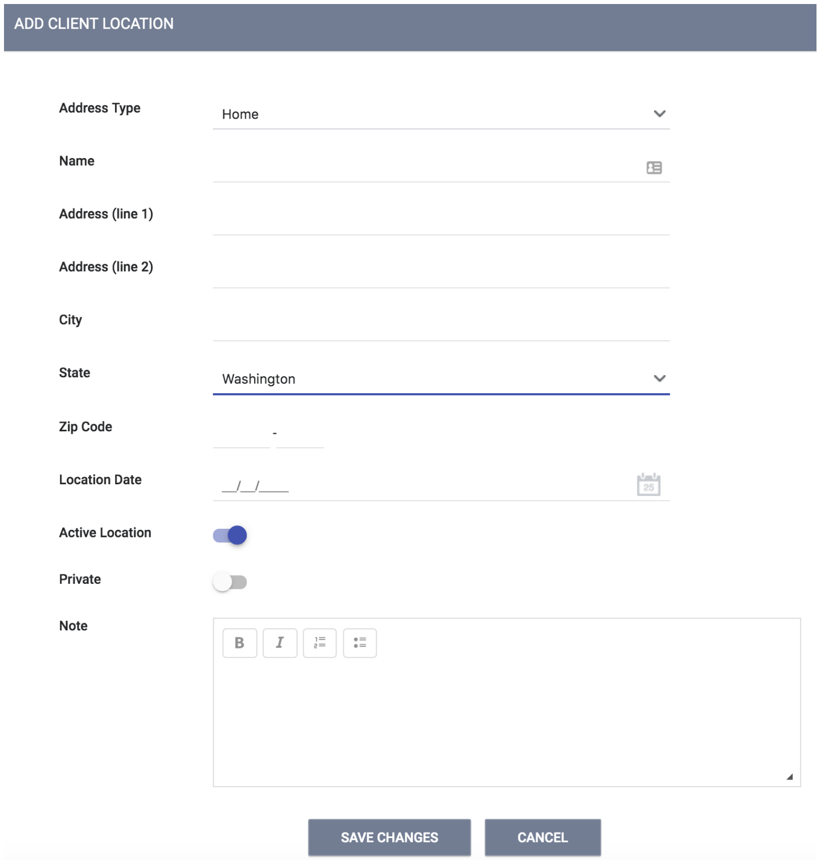


To add a client location or address:

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



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

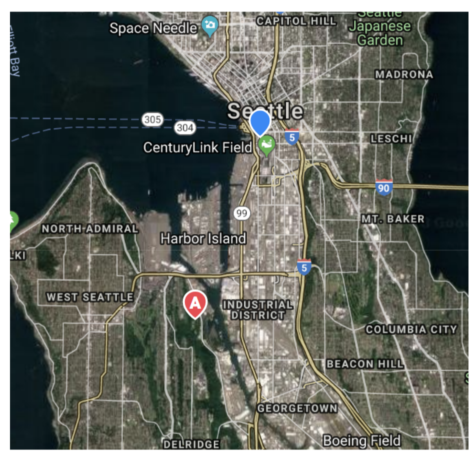


When the Active Location toggle is enabled, it is considered an Active address, otherwise it is Inactive

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

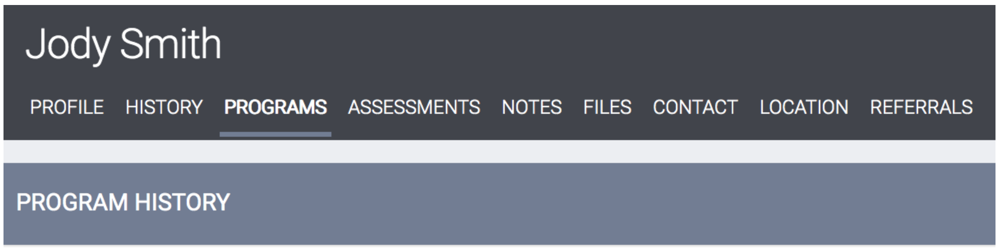
You will be notified at the top of the screen that your record has been saved.

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.



Enrolling Clients into Programs

The Programs tab in the client file contains two sections:

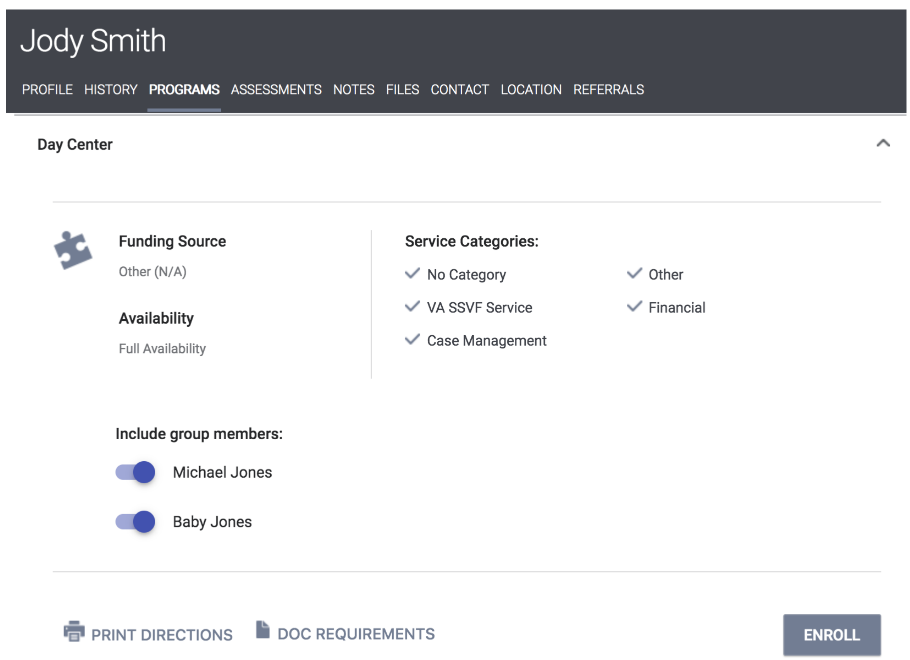


Program History provides a listing of programs your client is either currently enrolled in or has been enrolled in in the past.

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

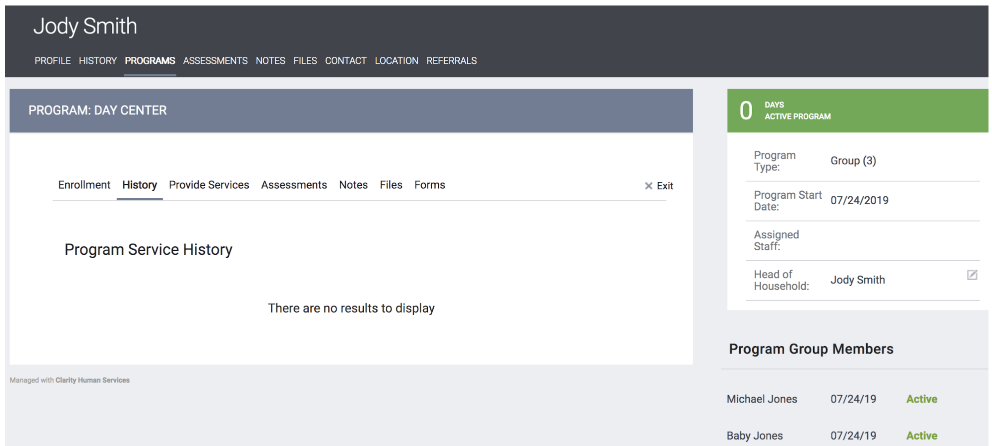
To enroll a client/household into a program, simply select the down arrow next to the applicable program title under Programs: Available.

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.



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."

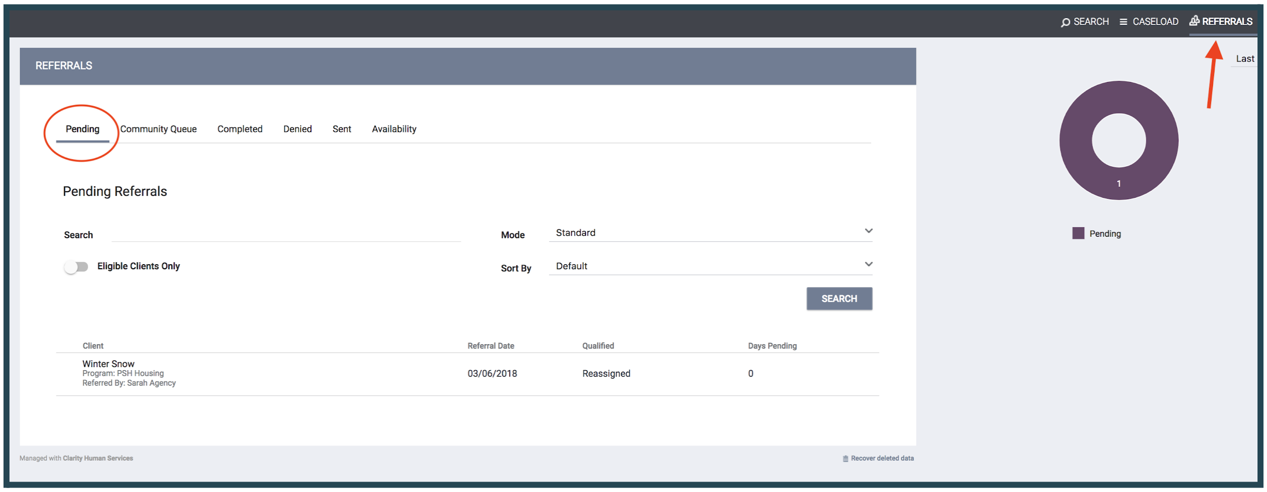
- The Release of information enter date, should correspond with both the date that the client signed the release and the date you created the client

Coordinated Entry Enrollment

More information and updates can be found at https://kcrha.org/data-overview/coordinated-entry-for-all/

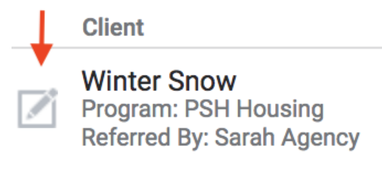
HMIS is used as part of the CoC's CEA system in accordance with the CEA Operations Manual, and aligned with the HMIS Data and Technical Standards at (CoC Program interim rule) 24 CFR 578.7(a)(8).

If your agency is participating in the Coordinated Entry process, 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.

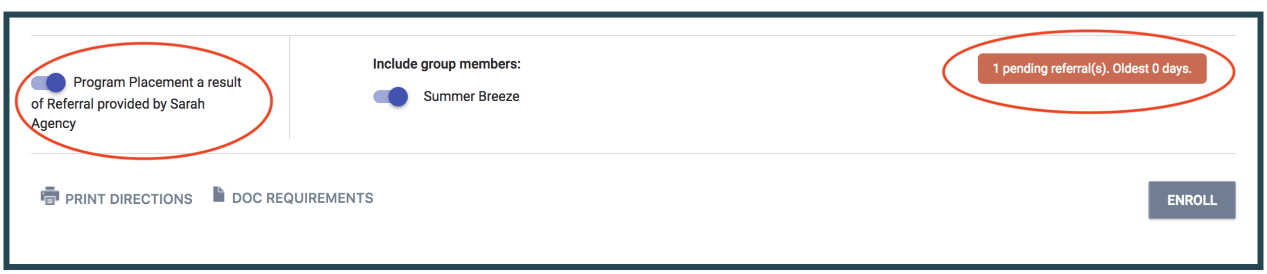


To enroll a client from the Pending tab of the Referrals section, select the Client Name (e.g. Winter Snow).

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.



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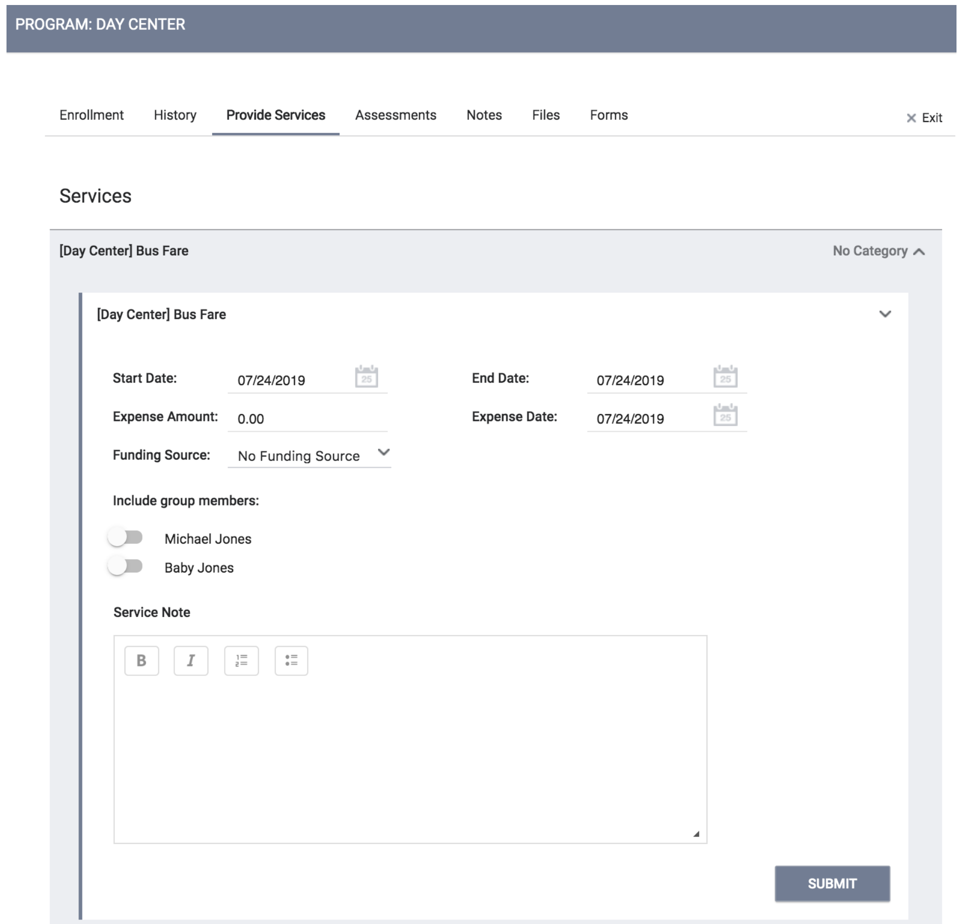
Entering Services, and/or Coordinated Entry Events

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.

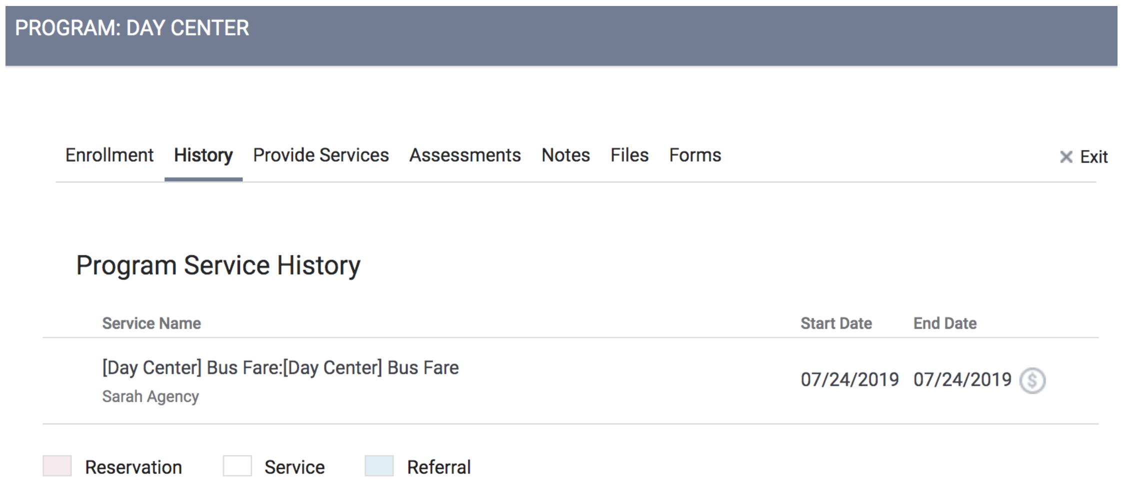


Enter the Start and End Dates and any expense associated with the service. Verify that the proper funding source is selected (if applicable) and select any group members who should also receive this service.

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

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:



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.

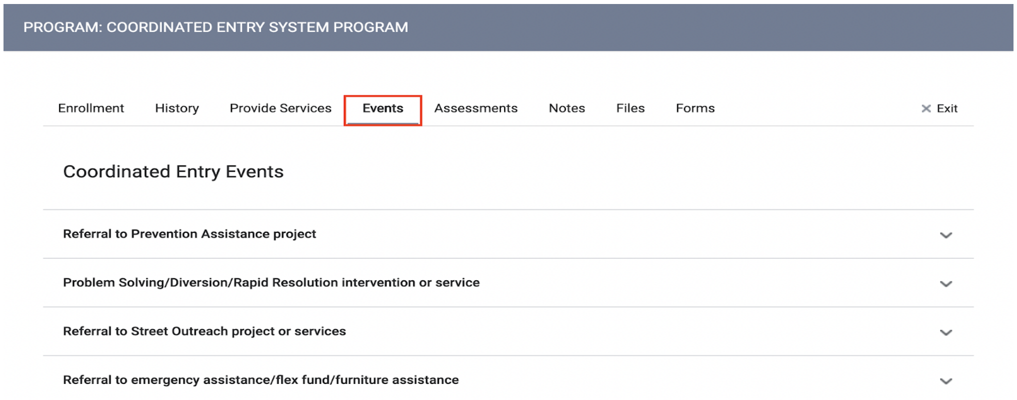
Coordinated Entry Events

Locate 'Events' tab

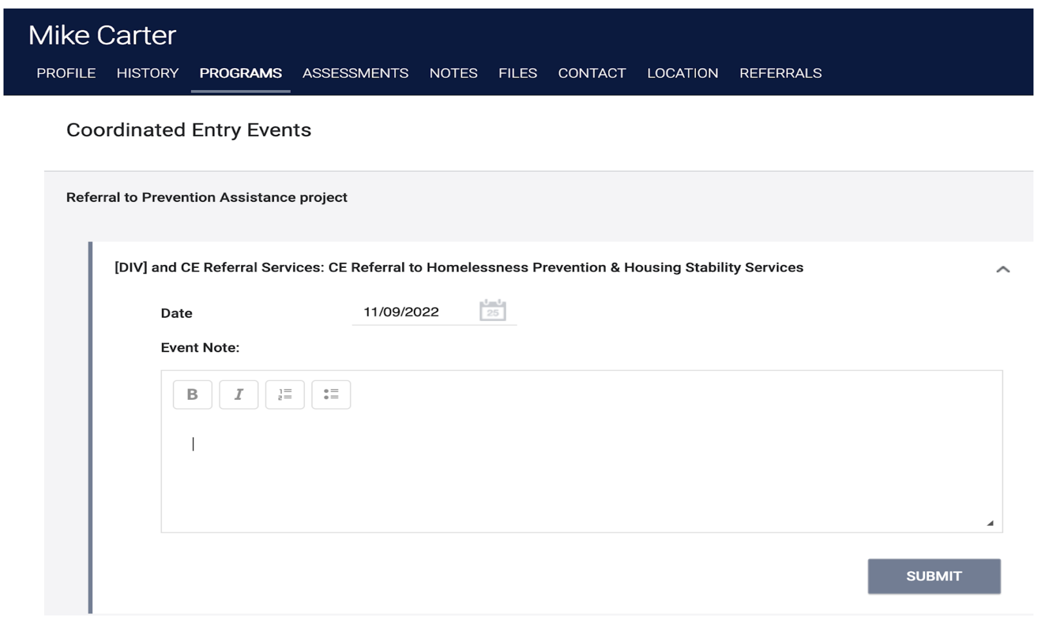
- Navigate to the client's program history by visiting the program tab.
- Click on the edit icon next to the coordinated entry system program option
- Navigate to the event tab.

Using the events tab

- Once you have located the 'Events' tab, click on the event that applies to your workflow; a drop down will then show a text box.



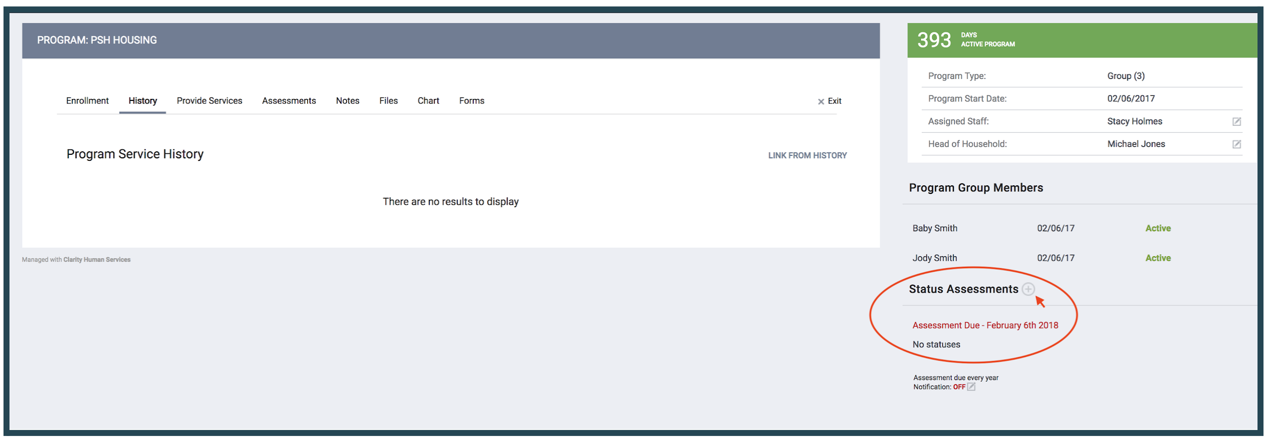
- When entering an event, the start date and end date will both be the date you provided the service for the client.
- Like services, events only needed to be entered for the head of household.



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.

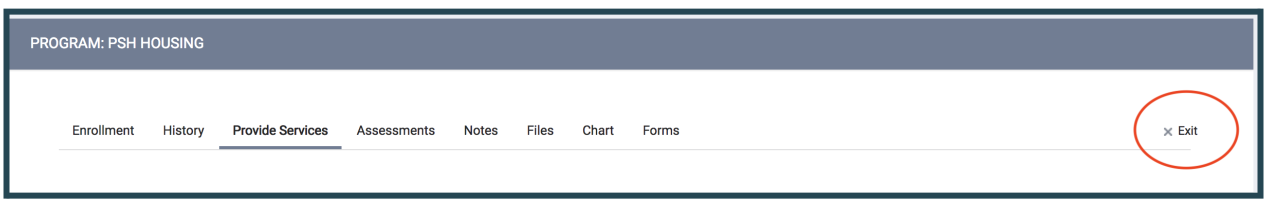
Completed assessments can be viewed and/or edited from the right side menu.

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.

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.

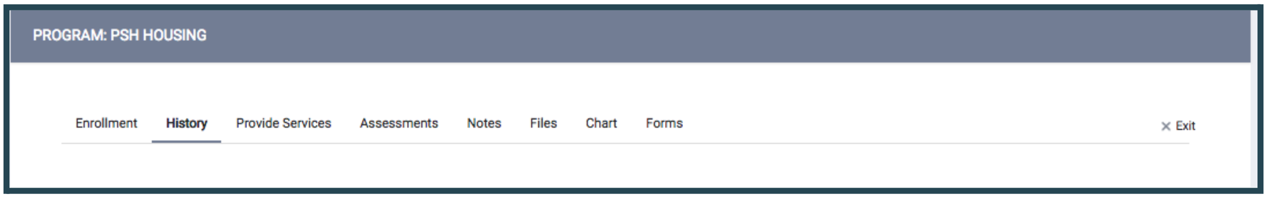


If this enrollment is a Group enrollment, you will be asked which members of the household you will be exiting (in most cases you should toggle each member and exit all group members at once). If you had check marked any group members to also be exited from this program, their Exit screen will automatically 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.

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
- 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

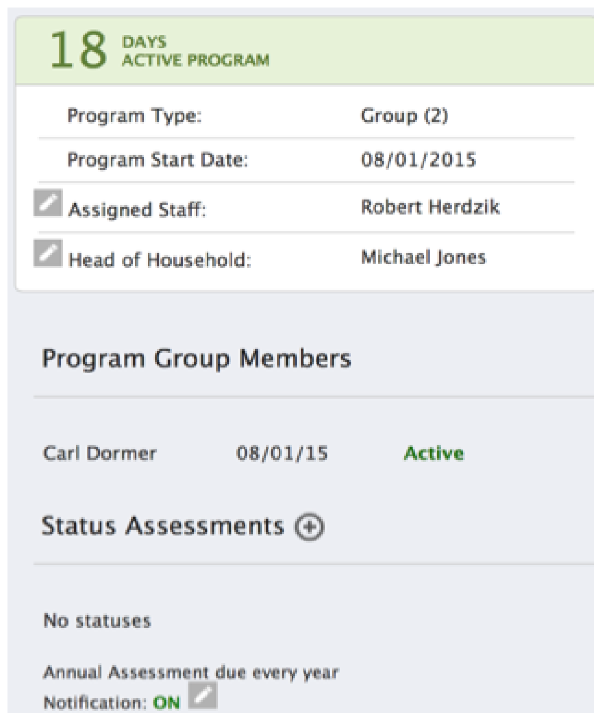
Right side menu of the Program page:

Current program status, type and start date.

Assigned Staff and Head of Household

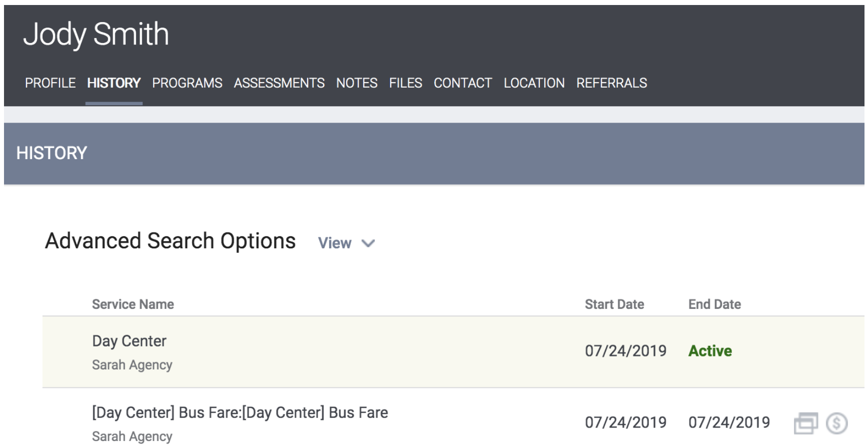
List of current group members with option to add new members or edit existing.

Option to add Assessments or edit/view existing.



History Screen Overview

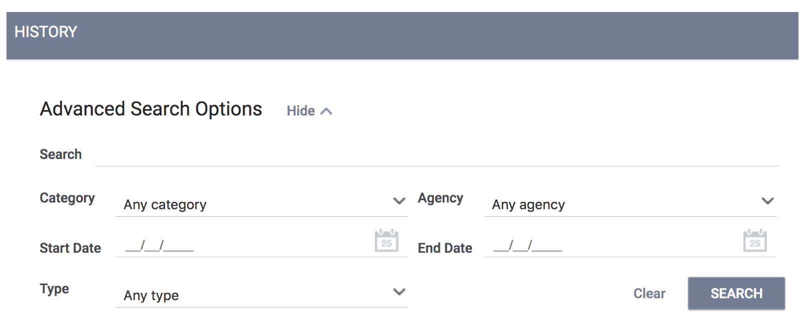
The History screen provides a complete look at Services and Programs that the client has participated in, while also allowing the ability to edit items provided by your agency.



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:



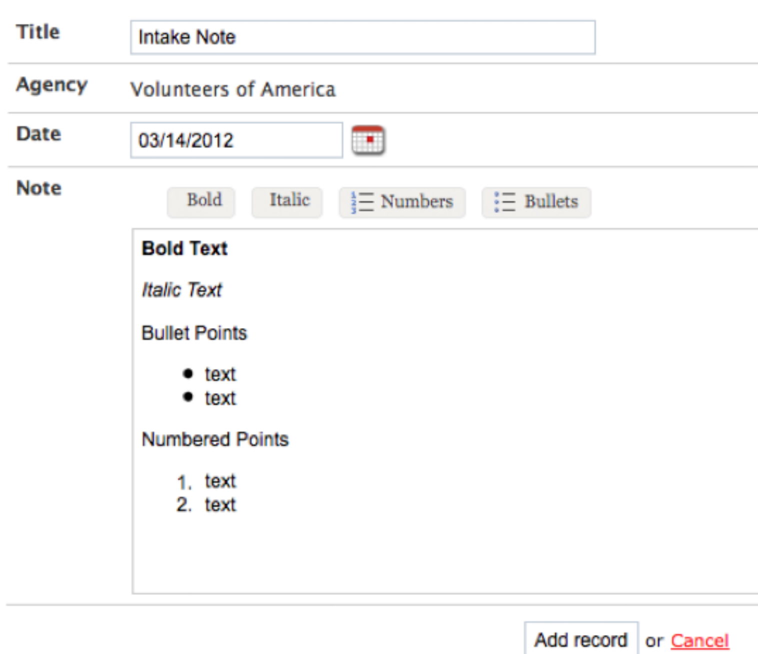
- Search – Filter for a keyword within the service title
- Category – Filter for a specific category of service using the convenient drop-down
- Agency – Filter for a specific Agency that provided the service
- Date Range – Filter based on a specific date range of service provision

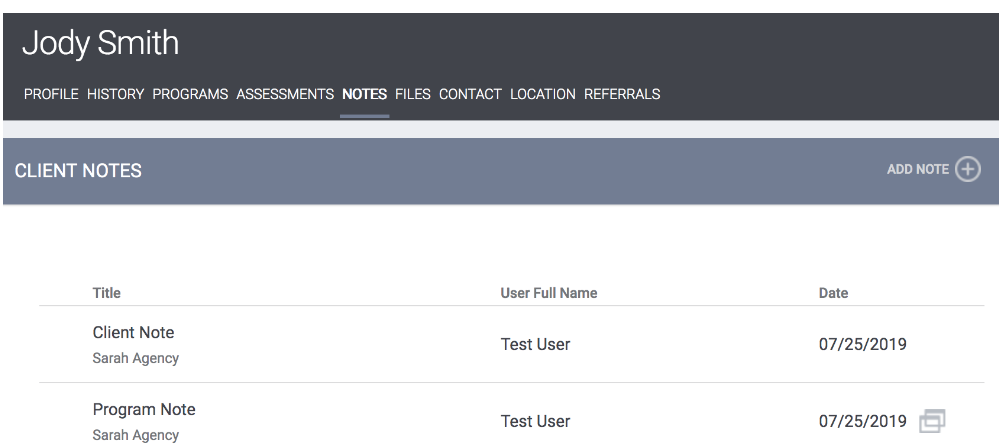
- Type -- filter for Assessment, Programs, Referrals, Services, or any/all of the record types

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.

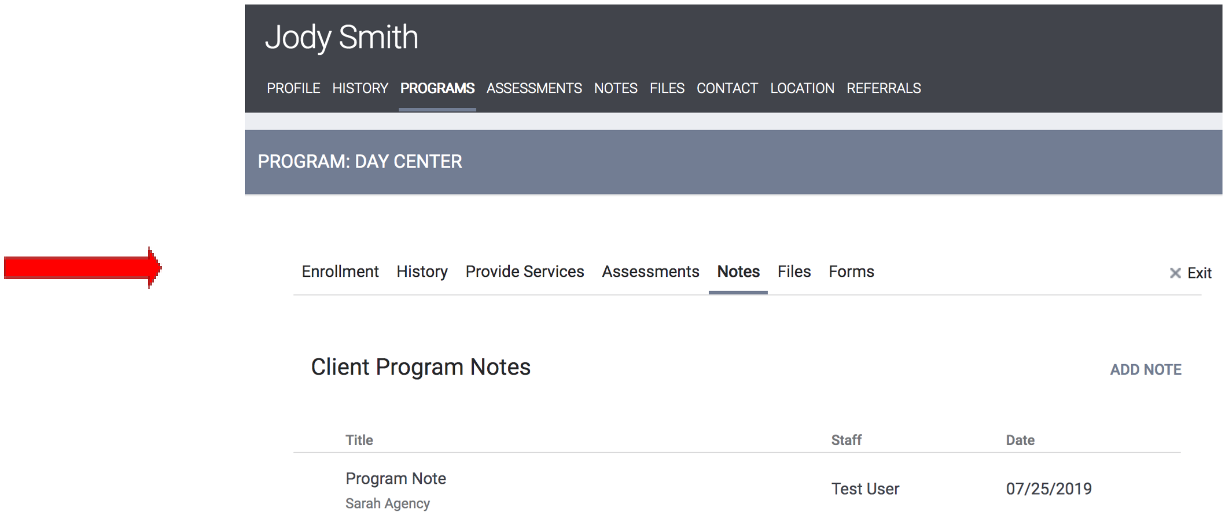
Case Notes

There are two different types of case notes within Clarity. There are program notes, which are connected to a client's specific enrollment, and there are client notes, which are connected to the client but not connected to a specific 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.



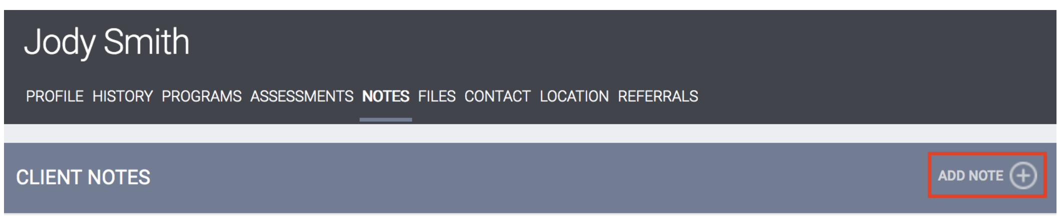


Program Notes appear in the Notes tab within the relevant enrollment.



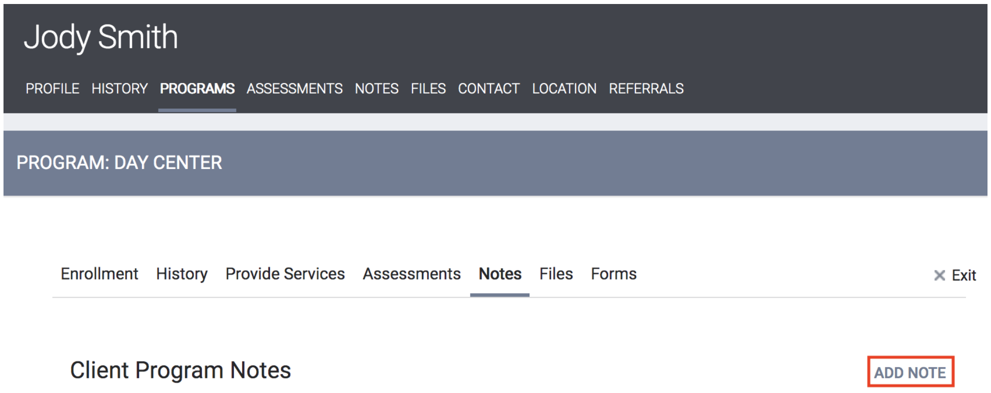
To add a client note, click on the Notes tab in the client file.

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



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."



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

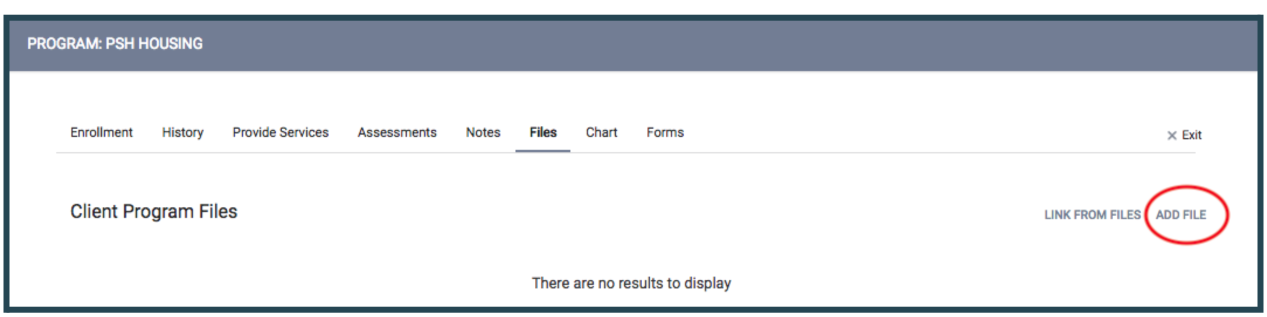
Saved case notes will be displayed by date. Mouse over to open/edit notes from your agency.

Uploading Files

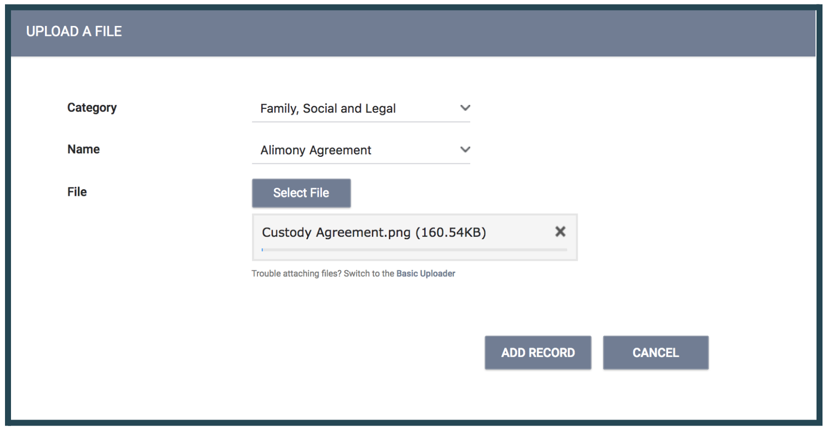
NOTE: This section will assume you have previously scanned and saved documents into separate files that are accessible through your computer.

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.



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

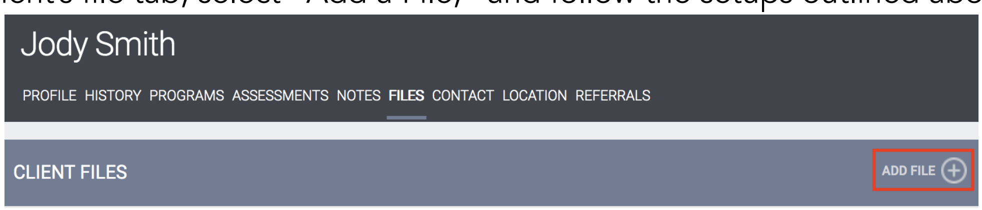


By clicking "Select File" you are using an advanced upload to select the file from your personal computer. If your system is not compatible with the advanced upload, you can choose the Basic Uploader.

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.



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.

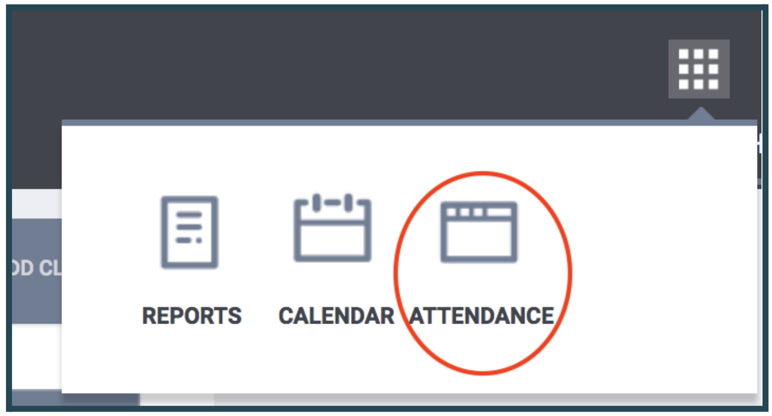
You can view the existing file simply by clicking View, or edit the document by uploading a new version.

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

Daily Attendance Service Transactions

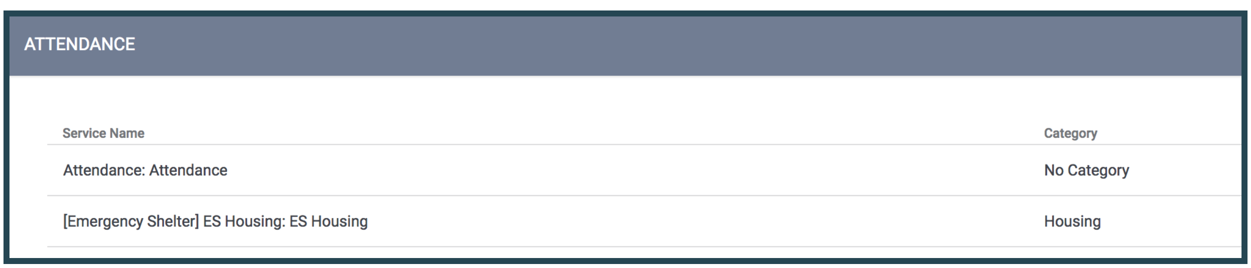
Daily Attendance is used for services provided on a day-by-day basis, allowing a large number of clients to be checked in for service very quickly.

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.



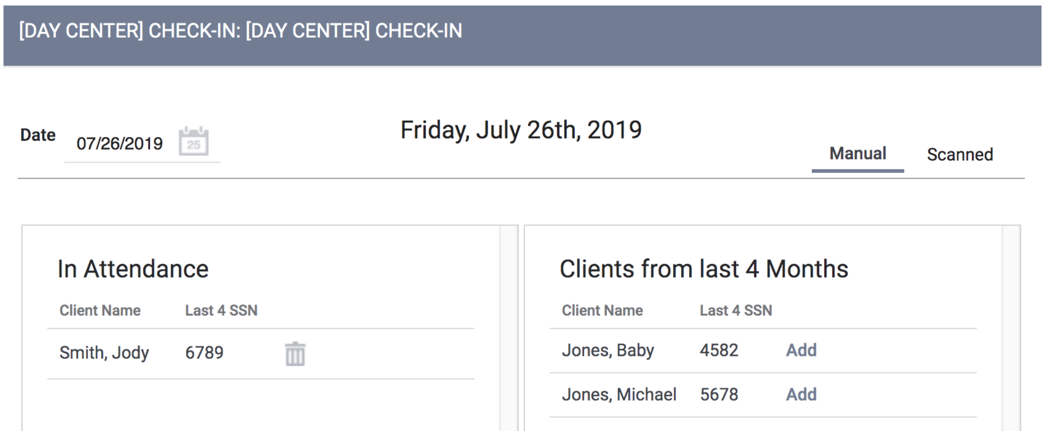
ATTENDANCE

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

Updated November 2023

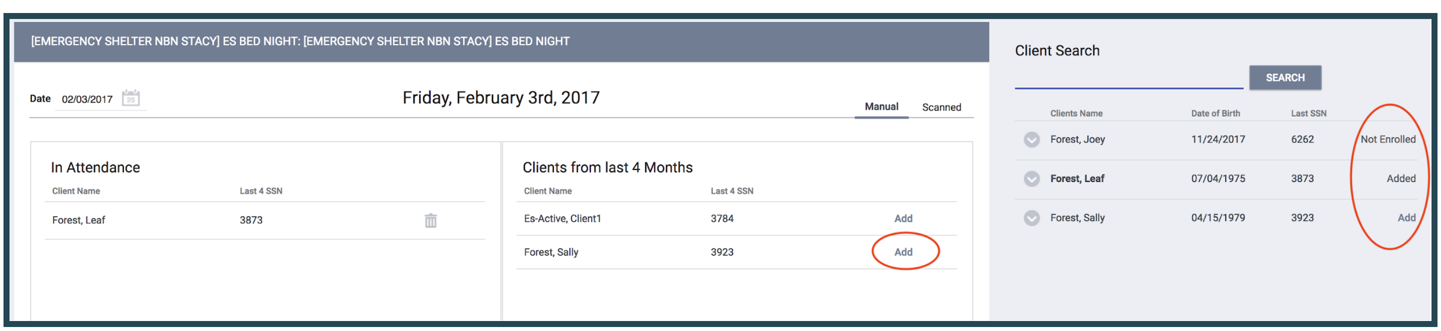
Select the appropriate date using the calendar icon at the top of the screen.
There are two columns on the Attendance screen:

- 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.



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).

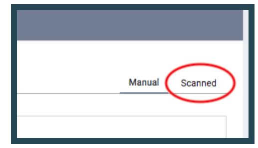


You can easily remove a client from attendance by clicking on the trashcan icon in the Attendance roster. This will remove the client from attendance and return them to the 4-month roster on the right.

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.

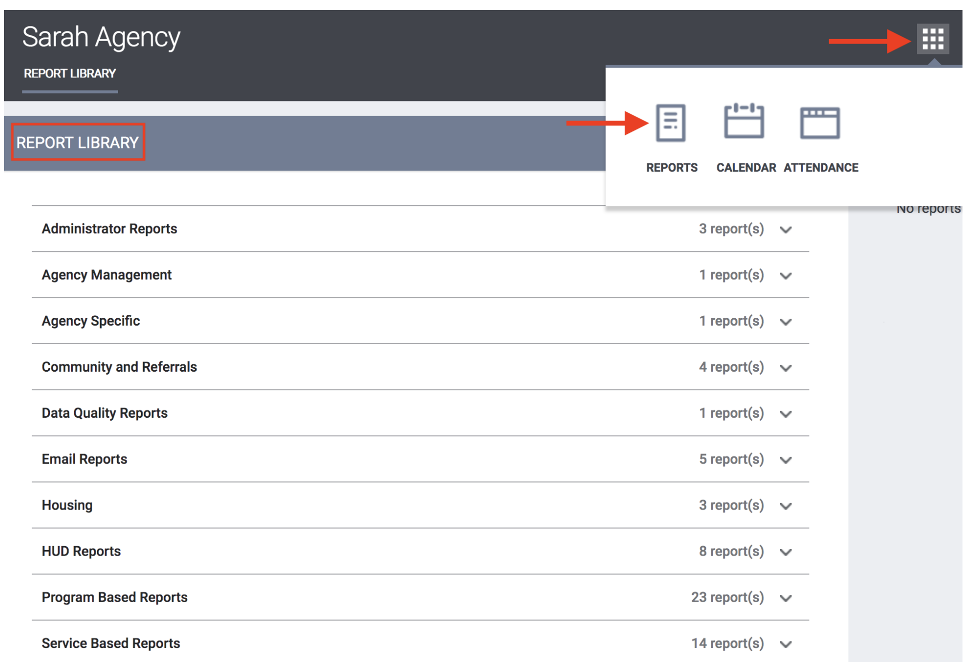
If your agency is using a scanner to enter clients into service via scan cards, use the Scanned button to upload your data file.



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.

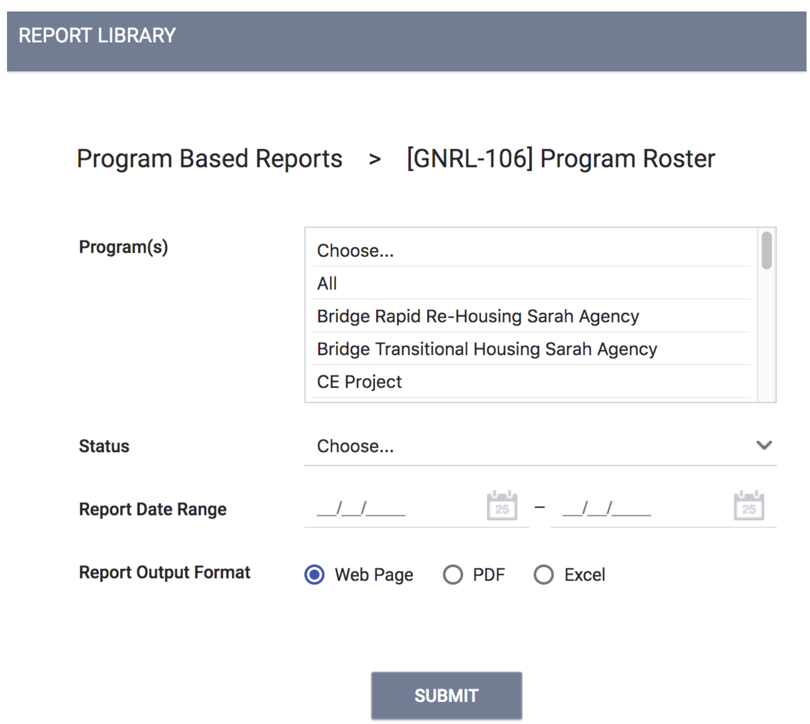
For more information on a particular report, select the "More Info" link. The screen will expand to include a summary of the purpose of the report.

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:

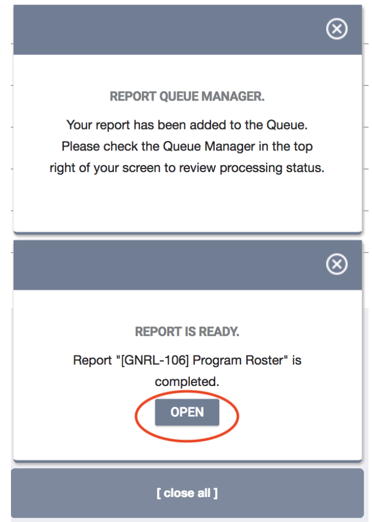
- Starting Date: This date will reflect the date from which you would like to generate data.
- Ending Date: This date will reflect the date you would like to stop generating data.



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 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.

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 such as public alerts, client appointment calendars, client level reports, and/or easy caseload access. Explore the Clarity Human Services Help Portal (https://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.