Alameda County HMIS Clarity User Manual

Version 20190710

Contents

Introduction

About This Manual

This training manual is designed to give you the information you need to work with data in the Alameda County HMIS. This manual is also used as the guide for the instructor led Alameda County HMIS software training. The software you will be using is for this manual/training is called Clarity Human Services developed by Bitfocus Inc.

Updates & Changes

The procedures laid out in this manual are subject to change as Alameda County adapts and responds to homelessness. In addition to this guide timely updates and changes will be shared with Alameda County HMIS users and stakeholders via monthly User Group Meetings and email updates.

Prerequisites:

To become a licensed user in the Alameda County HMIS, you must be certified in the Alameda Countywide Privacy and Security Training.

It is assumed that you are comfortable using a computer and have a familiarity with the user interface of modern operating systems (e.g. Microsoft Windows), and with a web-browser for accessing the Internet.

Resources

HMIS Support Email: hmissupport@acgov.org

- This is the Alameda County HMIS support email used for any questions, comments, or requests related to Alameda County HMIS.

HMIS Website: http://www.acgov.org/cda/hcd/hmis/

- This is the Alameda County HMIS homepage where you can find helpful resources like links, forms, training calendars, meetings, and HMIS policies.

Clarity Help Site: https://get.clarityhs.help/

- In addition to this manual the Clarity help site has many helpful guides on the Clarity Software. Please be aware that the instructions on this site may not be consistent with Alameda County guidelines.

HUD Exchange: https://www.hudexchange.info/

- This is a good resource on federal policies and guidelines related to HMIS

Everyone Home Website: http://everyonehome.org/

- The website for the CoC lead with information on Countywide Guidelines and Goals.

Security

Licensed User Access

Upon successful completion of your HMIS User Training, you will be given your licensed log-in information. Clarity can only be accessed by licensed users. To be a licensed user, you must:

- Receive Privacy and Security Training Certification
- Sign an Alameda County HMIS User Agreement
- Successfully complete Alameda County HMIS Clarity Training (this training)

Trainee Access

For this Clarity User Training, you will be given access as a trainee. This licensed access will only be useable on the Alameda County Clarity Training system. The training site does not contain any real client information. You will not be able to access your agency/jurisdiction's LIVE Clarity system without a license issued in your name.

Authorized Access

A user who is given licensed access to the Alameda County HMIS system **may not share that access with any other person at any time**. Sharing access is considered a breach of security and confidentiality and will result in consequences up to and including termination of user rights and potentially termination of employment.

Unauthorized Remote Access

Access to the HMIS system is allowed only from authorized agency locations. Remote access from an unauthorized location to the HMIS system is not permitted under any circumstances.

Such access is considered a breach of security and confidentiality and will result in consequences up to and including termination of user rights and potentially termination of employment as detailed in this manual (Alameda Countywide HMIS Policies and Procedures Manual).

The HMIS System Administrator will monitor access of the HMIS system to ensure compliance with the access policy. Agencies/jurisdictions must monitor all staff to ensure such compliance.

You may NOT, at any time, under any circumstances, access Clarity from your home computer (or any other unauthorized computer) unless your agency/jurisdiction has submitted an Agency Remote Access Request form to the HMIS System Administrator and the computer has been inspected and authorized for use.

Password Guidelines

Passwords must meet reasonable industry standard guidelines. By following the guidelines listed below, you will meet HUD and Clarity security standards.

- Your password should be 8 characters or longer, and be a combination of all four of the following
  - English uppercase characters (A through Z)
  - English lowercase characters (a through z)
  - Numerals (0 through 9)
  - Non-alphabetic characters (such as !,$,#,%)
- Your password should also abide by the following restrictions
  - Cannot contain your username, first name, or last name

- o   Cannot contain the word "clarity" or the word "alameda"
- o   Cannot contain "ABC" or "123"
- o   Cannot contain more than two (2) consecutive characters
- o   Cannot be the same as the three (3) prior passwords used for the account

Password Expiration

Your password will expire every 180 days. When your password has expired, a prompt window will appear when you try to log on to Clarity. You will need to choose a new password and enter it in the prompt window. You will not be able to re-use any of the three prior passwords used on your account.

Browsers and Passwords

NEVER let your Internet Browser store your login or password. Your browser may give you the option of storing your login or password on "this computer." NEVER USE THIS OPTION. It can give anyone using your workstation access through your browser. NEVER allow your computer to store your login or password.

Application Security

The following standards must be observed when working with the Alameda County HMIS.

Written information specifically pertaining to user access (e.g., username and password) may not be stored or displayed in any publicly accessible location. You may not log on to more than one workstation at a time. You may not log on to the network at more than one location at a time.

Workstation Security

Access to the HMIS system in Clarity must be secured at all times.

When workstations are not in use and staff is not present, steps should be taken to ensure that the computers and data are secure and not usable by unauthorized individuals.

After a short amount of time, workstations should automatically turn on a password protected screen saver when the workstation is temporarily not in use.

If staff will be gone for an extended period of time, staff should log off the data entry system and shut down the computer.

Lock Workstation

Anytime you leave your workstation unattended, for any amount of time, LOCK YOUR WORKSTATION with a password protected screen saver.

Password-protected Screensaver

Password protected screensavers should be set to activate within 5 to 10 minutes when the workstation is not in use.

Log Off for Extended Periods

If you will be gone from your workstation for 30 minutes or more, log-off Clarity.

If you will be gone from your workstation for 4 hours or more, log-off and SHUT DOWN your computer.

Automatic Log off

If you are logged into Clarity, but have been inactive for 30 minutes, you will be automatically logged off. Prior to logging you off a message will be displayed asking you if you want to continue or log off. If you don't respond, you will be logged off.

Printing and Disposing of Hard Copy Data

Hard copy data containing PPI may only be printed from the HMIS system at the physical agency/jurisdiction location(s) and only on printers secured from public access.

An agency/jurisdiction is responsible for disposing of documents that contain PPI by shredding paper records.

Clarity Overview
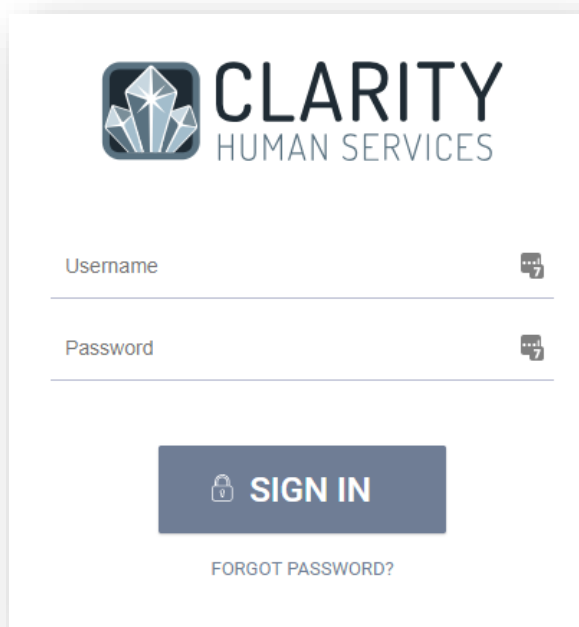
Starting Clarity

FYI:

As Clarity is a web-based (Internet) application, you must use your web browser to start the Clarity software.

How to:

1. Open your web browser. (Internet Explorer, Firefox, Chrome, etc.)
2. Go to Training Site: https://alamedatrain.clarityhs.com/
3. Enter the training account username which is generally Tr01 through Tr50.
4. Enter your training password which is generally: @2QWaszx
   - Note: This password is subject to change
5. Click on the "Sign In" button or press "Enter" on your keyboard.

Locked Out?!?

If you attempt to log-in five (5) consecutive times with the wrong password, your account will become locked. You have several options to unlock your account.

1. Wait 5 hours for your account to become unlocked and try your password again.
2. Click the "Forgot Password" link on the sign in page, this will send you an email with instructions to reset your password.
3. Contact your system administrator at the email listed at the beginning of this manual.

Note: In the LIVE database, the first time you log in you will be prompted to enter a new password, and type it in two (2) times. Select a new password following the guidelines above.

The Clarity Homepage

The Clarity Home page is the first page displayed when you log-in. The homepage also acts as the client search page.
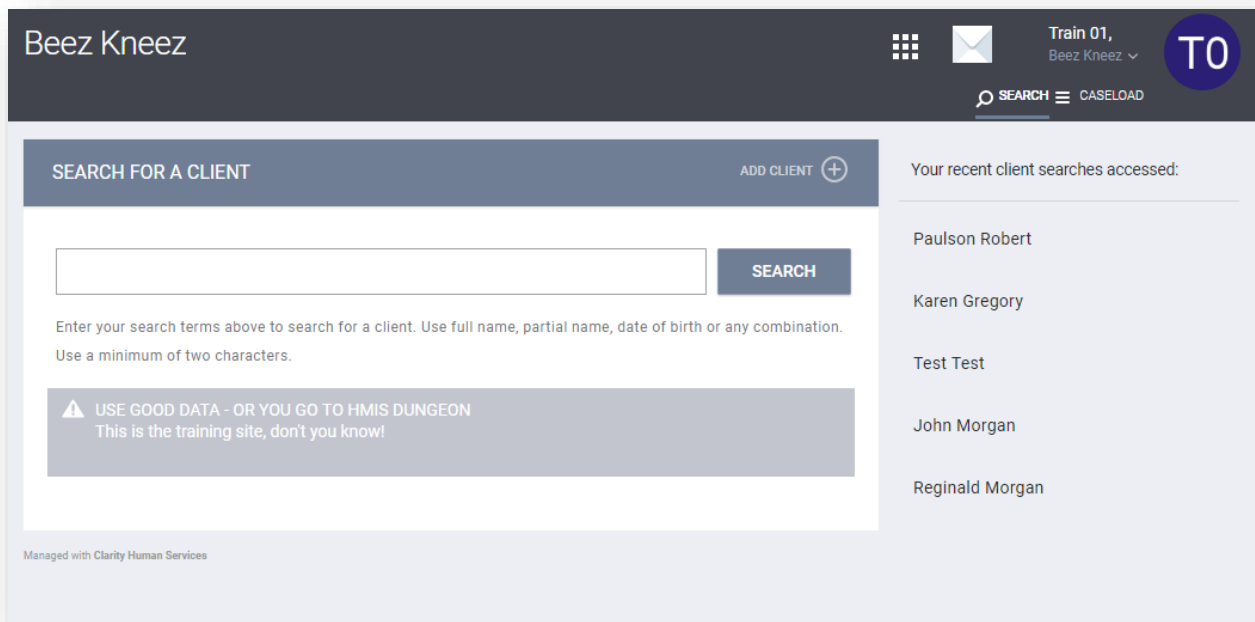
In the top left of the screen you will see the name of the agency you are working in. For training purposes we will use the Beez Kneez agency. All information in the training database is fictional.

In the top right you will see two icons. The *Envelope* Icon allows you to send messages to other staff in the system. And the "*Launchpad*" icon. Will take you to other Clarity modules like reports and the calendar. This will be discussed in more detail later.

You will also see your name and initials. You can click on your initials to access **Account Settings**. From this page you can update your Name, Email, and Password, or add an ID Photo.
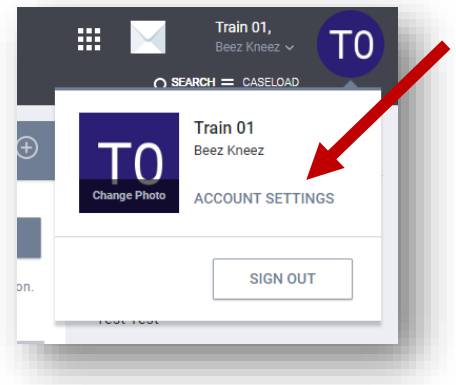
Searching For a Client

In order to view a client's information, or to add or edit their information, you must first locate the client record.   Before creating a new client, you must search to ensure that the client does not already exist in the database.

Search Criteria

To search for a client in Clarity, complete these three separate searches in the order listed below:

1. Enter a Partial Social Security Number (the last four digits of the SSN). SEARCH
2. Enter Partial First Name and Partial Last Name (two letters from first name and two letters from last name). SEARCH
3. Enter Partial Alias (two letters from the first or last name of the reported alias). SEARCH

Don't forget to go to the next page of the search results if you have multiple pages you will find a next page button at the bottom of the screen.

Searching By Multiple Criteria

If you still can't find your client it may be because you have too many results. Refine your search by combining the partial name and partial social. For example if my client was John Morgan with a social security number of 111-222-3456. I can perform the following search for "Jo Mo 3456."

You can also combine Partial Name and Birth Year. Or partial name and partial alias.

A full date of birth can be used to search, with the following formats: 05/15/1995, 5/15/95, or 1995-05-15. You can also search by just the birth year, such as 1995.

DO NOT SEARCH ON FULL NAMES - LESS IS MORE!

The fewest letters used in searches will find the most possible matches. This helps prevent duplicate clients being entered due to misspellings!

Opening the Client Record

Look in the search results for your client. If you find them verify that the Date of Birth and Last Four of SSN are correct before opening the client record. To open the client record click on the pencil icon next to their name.

Searching Overview

Your search to determine if the client already exists in the HMIS system needs to be thorough. If you don't do a thorough search, the likelihood of creating a duplicate client record is very high.

Keep in mind that if a client was entered by another provider in the HMIS system, it's possible that an alias was used, or the name could be spelled differently. This is why we ALWAYS SEARCH ON PARTIAL SOCIAL SECURITY NUMBER FIRST.

If no possible matches show up on the Social Security number search, always include a search on partial name and partial alias, separately, using the fewest letters possible. Only after exhausting these searches should you try combining different criteria.

Remember: LESS IS MORE!

The Client Profile

The client profile page is the first page you will see when you go to a client record. Client profile data is shared by all agencies participating in the HMIS System. This page contains client demographic information and a summary of household members. You will use this page to navigate to other sections of the client record. And perform record keeping functions.

Updating the Client Profile

The client profile can be updated by editing any field on this page and clicking "Save Changs." Updating the client profile and other data fields in the system create an audit trail associated with your account.

Unique Identifier

Each client has a unique identifier consisting of 9 numbers or letters. The Unique ID can be used to search and should be added to any hardcopy records for this client.

Data Field Types
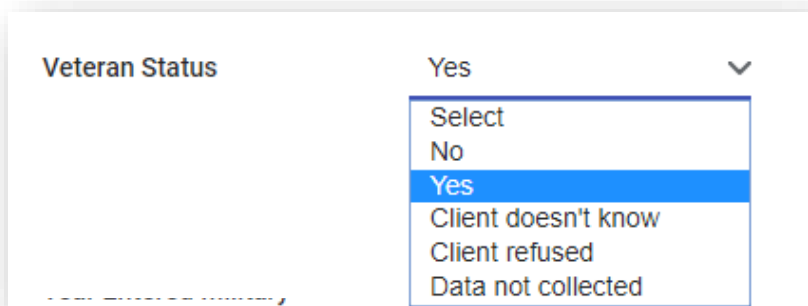
A data field is a part of the screen where client information is entered or viewed. Clarity consists of many different types of data fields.

Date Field

Date fields require you to type in the date in a specified format, mm/dd/yyyy. You must type two digits for the month, two digits for the day, and four digits for the year. Sometimes you may see a small calendar icon next to the field where you can pick your date using a calendar.

Picklist Fields:

Picklists are the most common field you will find in clarity. These fields require that you select a value from a predefined list. Picklists are 1st letter sensitive, press the "Y" key on your keyboard to automatically jump to "Yes."
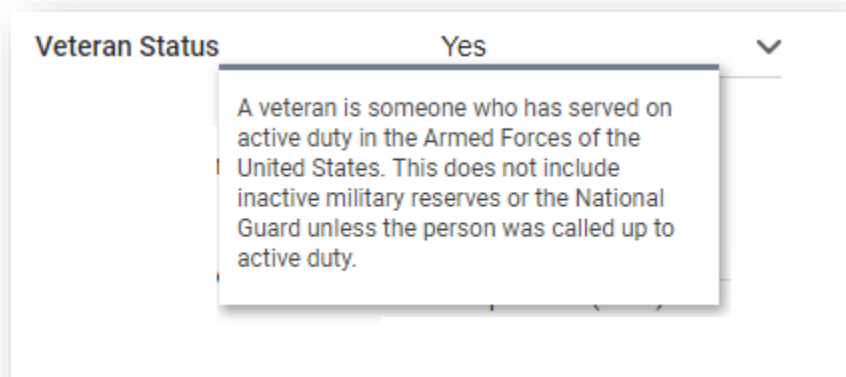
Text Fields

Values are entered by typing them into the space provided. Numbers should be entered as whole numbers as much as possible. When entering dollar values, the leading dollar sign ($) is not necessary nor are trailing zeroes. For instance, $500 would be entered as 500 and not as $500.00.

Question Description and Help Text

If you're not sure what information is expected in the data field, you can hover over to the question label. A window will open displaying more information.

Conditional Fields

Many fields in Clarity will only appear under certain conditions. For example, if the client is not a veteran than fields relating to veteran status will be hidden from the screen. You will notice fields appearing (or disappearing) throughout clarity as a result of other factors on the screen.

Adding a New Client Record: Step-By-Step

Before You Begin:

- Review Intake Forms for completeness & consistency
- Review ROI (Release of Information) to ensure that it valid and is dated on or before the project entry date

New Client Workflow

1. SEARCH 🔍 for client record using all search methods described above
    a. If found – Select that client with the pencil icon and go to Step 3.
    b. If not found using all three search methods – continue on to Step 2
2. ADD (+) Client
    a. ENTER Client SSN, Name, Alias, DOB, and all other data fields
    b. ENTER the ROI, Permission, Date, and Documentation Type as indicated by the client's on the ROI form.
    c. Click Add Record
3. WRITE new Client Unique Identifier on the Intake form.
4. SEARCH 🔍 for each additional household member.
    a. Repeat steps 1-3 for each household member
5. MANAGE the household (skip this step if the client is a single adult with no children)
    a. Search for and add each household member
    b. Set the head of household and household relationships
6. PROJECT ENTRY, go to the Programs tab to start a project entry
    a. SELECT the Project from the available list
    b. INCLUDE the applicable group (household) members
    c. Enroll the clients
7. ENTER all answers on the enrollment screen for each household member

The next several sections will walk through each of these steps in detail

Search For Client Record

Before you add a new client to Clarity, you must first search to be sure the client hasn't already been entered in the HMIS system. The client may have received services from another provider and been entered in the system by that provider.

We already covered searching in the Searching For a Client section (pg 9)

REMEMBER: There are over 60,000 client records entered in HMIS, so there is a very strong likelihood that a record for your client has already been created by another agency that provided services.

NOTE: If duplicate, or suspected duplicate clients, are found, e-mail hmissupport@acgov.org. Send both of the duplicated client IDs only. Do not send any personal information about the client via email.

Add a New Client

Once you have determined that the client is not currently entered in the system, AND you have a completed Intake form and ROI, you are ready to add the new client record.

From the Client Search page, click the ADD CLIENT (+) button.

A new page will open which you need fill out before you can add the client. Fill out all fields on this page including SSN, SSN Data Quality, Client Last and First Name, Name Data Quality, Alias, DOB, Gender, Race, Ethnicity, Veteran Status, and all other fields that appear on this page.

Entering Client Alias

The Alias field contains a list of names that the client is known by or used when receiving services. The alias field should only be added to.

For example, a client, currently using the name John Doe, received services using the name Jack Doe in one agency and Jonathan Doe in another agency. The agency serving the client as Jack Doe would add "Jack" to the alias field. The agency serving the client as Jonathan Doe would add "Jonathan" after the name Jack in the alias field and separate them with a comma.

In this example, the Alias field would contain "Jack, Jonathan".

Do not delete names in the alias fields.

Add the ROI (Release of Information)

You are required to add an ROI when adding a new client. The release of information section is located near the upper right section of the new client screen. To add the ROI:

1. Enter the permission - Yes or No
   a. IF permission is No you will not need to enter any more information for the ROI
2. Enter the start date the ROI
   a. This is the date listed on the signed ROI
   b. The term of the ROI will automatically calculate as 10 years
3. Enter the Documentation type
   a. Signed Paper Document
      - Enter the Location as the name of the Organization that administered the ROI
   b. Attached PDF
      - Upload a scanned copy of the signed and completed ROI

Save the new Client Record

When you are finished with this page click ADD RECORD. If you see a red bar at the top of the screen this is because you left a required field blank. Carefully review all the fields on the page for any <u>red blanks or errors</u> and correct them. Then try to save the record again.

Record the Client ID

Each client is clarity is given a 9 character unique ID. Record this id on the Clients intake. The unique identifier can be used to search for the client or verify their identity in the future.

Missing Information

You should always strive to make the client record as complete and accurate as possible. Before entering missing data into the system check with the staff member who collected the information to make sure this wasn't a mistake. If information is missing or incomplete make sure so indicate the correct value in the data quality field (Quality of SSN, Quality of Name, Quality of DOB, etc..).

If any portion of the Social Security Number is missing, indicate the missing digits by entering a zero (0)

| Social Security Number | 000 | - | 00 | - | 4321 |

Managing Households

When a family or group is seeking services together, they should be entered as a household in Clarity. People seeking services together do not need to be married to be entered in a household. For example, an adult, sibling, and Aunt may seek services together. They would be associated as a household.

A parent seeking services with his/her children are always entered as a household to be counted as "family members." clients must be entered in a household BEFORE moving on to create a Project Entry or other records.

Single Clients

Clients that are being served as an individual do not need have a household. If a client is entering a project by themselves as a single adult or unaccompanied youth this section can be skipped.

Set Up the Household

Search for Each Member of the Household

Before associating the clients as a household you must make sure all members of the household have a client record. Go to the Clarity homepage and preform a thorough search for each client in the household. For instructions on preforming a see the section called Searching For a Client (pg. 9).

If the household member does not exist in the system add the client as show in Add a New ClientOI (pg 14).

Manage Household

Go to the Head of Household's client profile. Click the Manage button on the right side of the client profile screen.

Within the right sidebar, your 10 most recently accessed clients will appear under the section titled "Your recent client searches accessed". If the household members are not listed in the recent search section, search for the client in search bar. If the household member does not exist in the system you will need to return to the clarity homepage and add them.
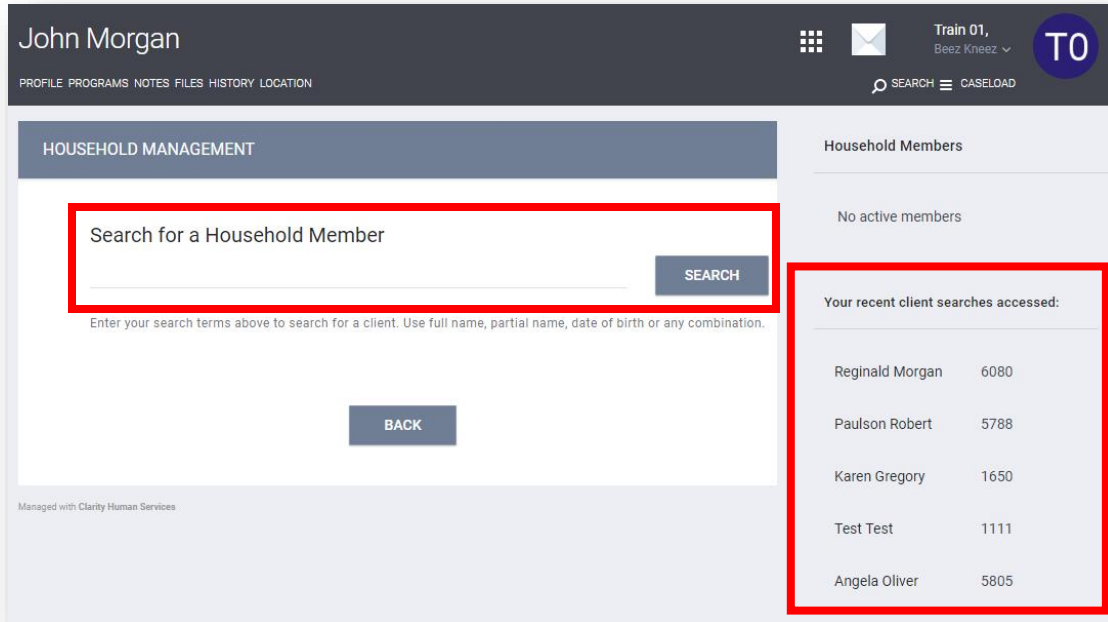
Add (+) a Client To a Household

If you hover over a client in the recent searches section, you will see a Plus (+) icon. Click the Plus (+) icon to display a new window.

- The member type should be the client's relationship to the Head of Household.
- The start date is the same as the client's first project enrollment date.
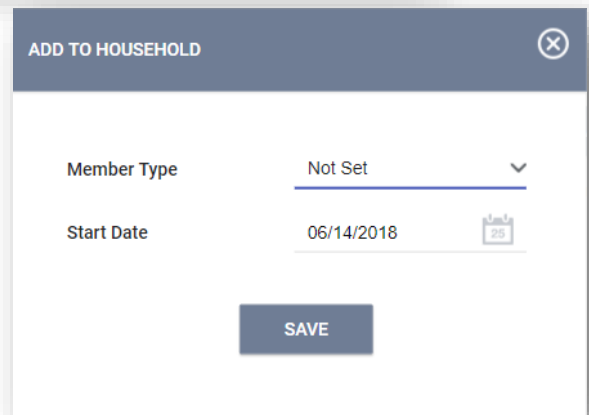
Joining Existing Households

You may notice that a client in the recent searches section have a join icon instead of a plus icon. The join icon indicated that the client is already part of a household and you will need to join the two households together. Remember, a client can only be part of one household at a time.

The ROI (Release of Information)

Confidentiality and/or Security Breaches:

A breach of client confidentiality and/or security will result in consequences up to and including termination of user rights and, potentially, termination of employment.

ROI Permissions

Information in the client profile pane is always visible to all Alameda County HMIS participating providers. The client may limit the data to be entered in this pane if they are at risk, but whatever is entered is always visible to all users.

Entering an ROI

ROIs are required to be entered at client creation. If you need to edit or add an ROI start by opening the ROI screen by clicking on the shield icon the in upper right corner of the client profile.

Then click on the add release of information button.

When a household consists of adults and children, one of the adults signs the ROI for themselves and their children, under the age of 18. To enter these into clarity you must go to each of the client profiles and enter each ROI separately.

Adults over the age of 18 and unaccompanied youth should each have a separate ROI. Children under 18 years old are included on their parent or guardian ROI form.

Project Entry

A Project Entry in Clarity is like a "stamp." A Project Entry stamps the beginning and end of a client's participation in a project. A client may have several Project Entry stamps.

For an agency or jurisdiction to report on the number of project participants and/or services during a specific time frame, every client must receive an Entry and Exit for every project, using the Programs tab. Project enrollments also act as a record of services provided to the client and a history of that client's case.

ALL household members must be added to the household BEFORE the project entry is added.

A HUD Project Entry/Exit is REQUIRED for all clients in HUD funded projects. Neglecting to create a HUD Project Entry can result in the loss of HUD funding.

Project Entry Walkthrough

1. Confirm that you are located on the correct client profile by verifying Name, DOB, & SSN
2. Click the "PROGRAMS" tab near the top of the page
3. Expand the correct Program from the list of available programs on this page
4. INCLUDE HOUSHOLD/GROUP MEMBERS
   a. Include all household members receiving services by checking their names under the "Include Group Members" section
   b. You do not necessarily need to check ALL group members, only those receiving services together
5. Click Enroll
   a. Fill in all fields on the enrollment screen.
   b. All fields are required for all household members
6. Click Save & Next (or Save & Close) until all household members are complete

Entering Client Updates

Annual updates are required within 30 days before or after the anniversary of the Head of Households start date. An annual update is required for each year the client is enrolled in the program. The annual update should be completed for all household members. NOTE: certain programs require more frequent update of client data in HMIS.

Entering the Client Update Walkthrough

Starting on the Programs tab of the Head of Household, locate the current active program entry that will be updated. Click the pencil icon next to that enrollment to open the enrollment page.

1. Click on the "Assessments" tab located under the program name
   a. *NOTE: there is also an "Assessments" tab located under the client name. This is NOT used for Annual Assessments.*
2. Click the START button next to Annual Assessment
3. Check the boxes to include ALL household members and Click Add Annual Assessment
4. On the Next Screen(s) confirm and update so that all information is accurate and complete
   a. Confirm that the Assessment Date is accurate
5. Save the Annual Assessment

Determining Who Needs an Annual Assessment

Annual Assessments are a federal and local requirement for all clients and are an important way of keeping records up to date. The HMIS software provides several methods to help determine when Annual Assessments are required for your client(s).

1. Looking on the right-hand side of the client(s) enrollment page will show a red error when a client is missing an annual assessment.
2. The Assigned Staff, also shown on the righthand side of the enrollment page will receive an email notification by default 2 weeks before the assessment is due.
3. Clarity also provides a CASELOAD module that will display when assigned clients are due for an Annual Assessment. More on this later.
4. Finally, there are several reports, available to all users, that provide information on missing annual assessments. These include:
   - HUD Reports > Annual Performance Report
   - HUD Reports > HMIS Data Quality Report

Reporting will be discussed in more detail later.

Contact and Location Info

Location and Contact info should be updated for all clients. Accurate contact info allows for service providers to get in touch to coordinate services and in the case of an emergency. Contact and Location data is shared across the Alameda County HMIS and all HMIS users are responsible for maintaining current and accurate information in this section .

Locations and Addresses

Locations including client address info is added under the "Location" tab located at the top of the client profile. Click the "ADD ADDRESS" button or edit an existing location to add additional details.

On the next page select the Address Type from the drop down and enter an address Name.

There are many address type options to choose from including: Home to designate a permanent address such as an apartment or house. And Unsheltered/Encampment Location to designate where the client is staying outdoors.

Then enter the street, city, state, zip, Location Date (the date the client used this location), and applicable notes.

Valid addresses will appear as red points on the map.

Locations can be marked as active or inactive. Mark locations as inactive when a client no longer uses or occupies that location.
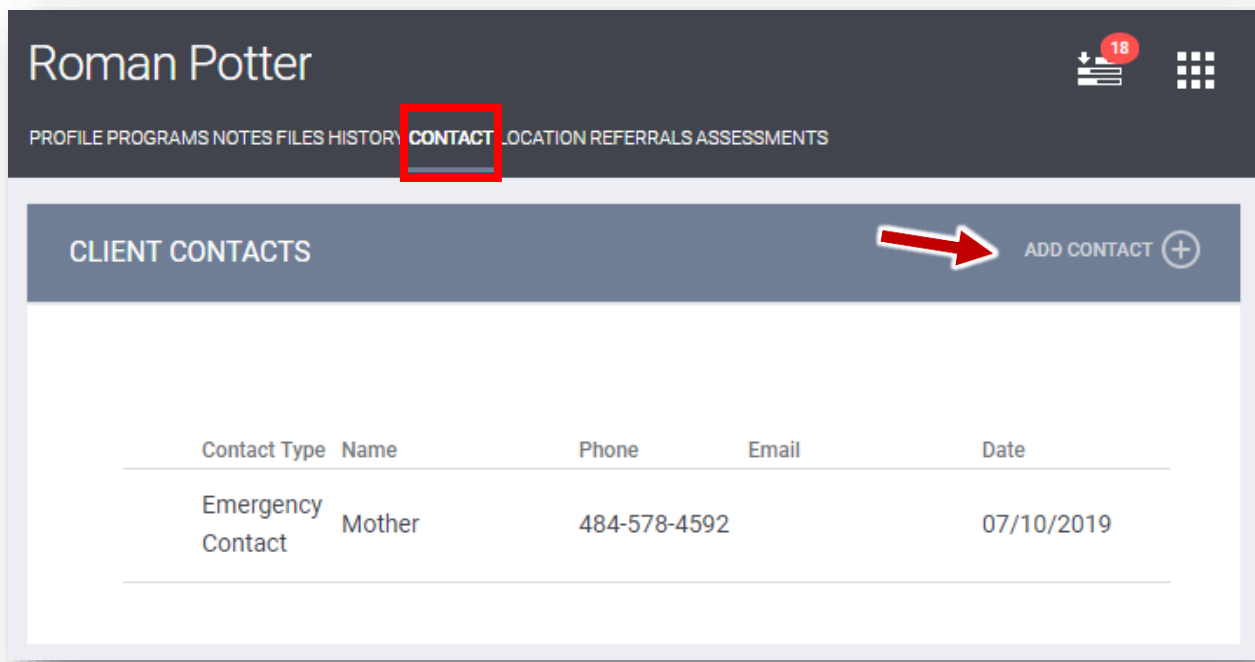
Do not mark Addresses/Locations as private.

Contacts

Contacts behave similar to Locations, however contacts are designed to store email and phone numbers related to a client. To view or edit contact information click on the CONTACT tab at the top of the client profile. Click the ADD CONTACT button to add a new contact.

Select a Contact Type

There are several Contact Types to choose from.

- Client contacts indicate that a client can be reached directly at that email/phone number.
- Emergency contact is a friend or relative that should be contacted in an emergency
- Housing Navigator, Case Manager, Primary Healthcare Provider, or Public Benefits contact are various types of service providers that can be added as a contact

Include additional details in the Notes section.

Do Not Mark Information as Private

Marking information as private will prevent others from accessing that data. In the interest of an open system that allows providers to best serve their clients, as well as data quality improvements. Never mark information as private in the HMIS System.

Adding Services

In HMIS services are meant to indicate additional or more specific services that were provided to a client in addition to the program entry. A client must be enrolled in a program in order to add services.

Adding a Service Workflow

To add a service open the profile of the client that received this service:

1. Go to the PROGRAMS tab
    a. Open the program enrollment where the service was provided
2. Click the Provide Services tab under the program name
3. Select the service
    a. Click on the Service Category that was provided to expand it then
    b. Click on the Service Item
4. Enter all relevant service information including
    a. Start and End Dates
    b. Expenses, Funding, and Time Tracking (if applicable)
    c. Include Group Members if the service was provided to multiple household members
    d. Add a Service Note that describes the service being provided
5. Click SUBMIT to save this service.

When to Add a Services

Service tracking requirements vary between programs and contracts. Consult your program manual or contractual requirements if you do not know when to enter services for your program.

Adding Case Notes

Case notes are another feature that allow a user to record notes and updates on a client's case.

Adding a Case Note

To add a Case Note open the profile of the correct client:

1. Go to the PROGRAMS tab
    a. Open the program enrollment where the service was provided
2. Click the Notes tab under the program name
3. Click ADD NOTE
    a. Enter a Title, Date, and Time Tracking
    b. Enter the Case Note
4. DO NOT select the private button
5. Click ADD RECORD

Notes will not save until you click the ADD RECORD button and see the "Saved Successfully" message. It is not recommended for you to type part of a note without saving, this note will be lost if the window is closed or you are logged out.

Why Are there 2 Notes Tabs?

You may notice there are two Notes tabs available on the screen. One is under the client name and one is under the program name. The upper notes section above the client profile is used if the client does not yet have a program enrollment and to add PUBLIC ALERTS. You can read more about this in the PUBLIC ALERTS section. Regular Case Notes that occur as part of a program enrollment should be added in the Notes section located under the program name as indicated in the screenshot below.
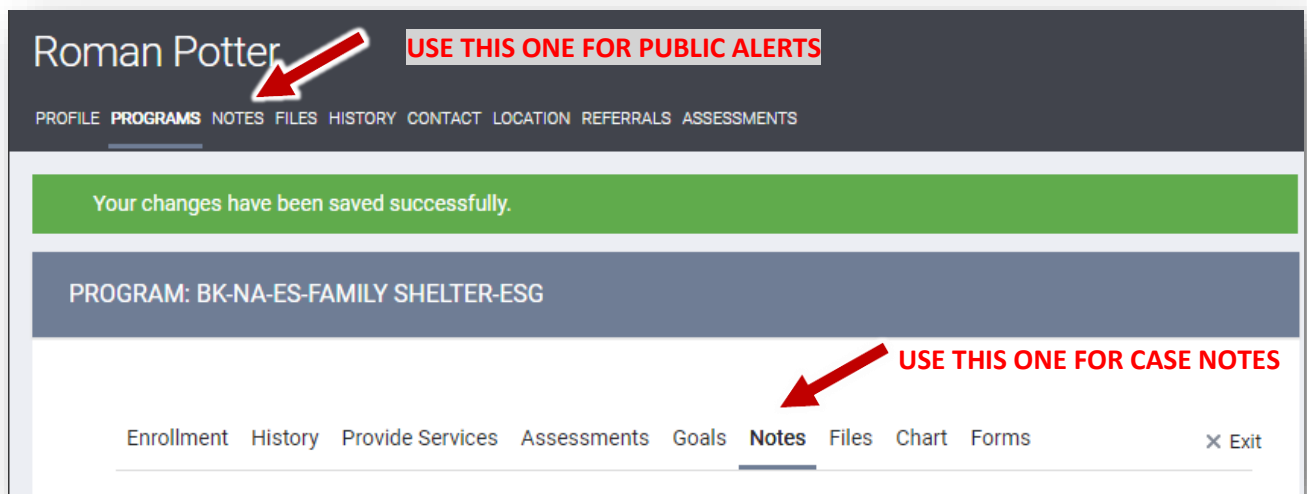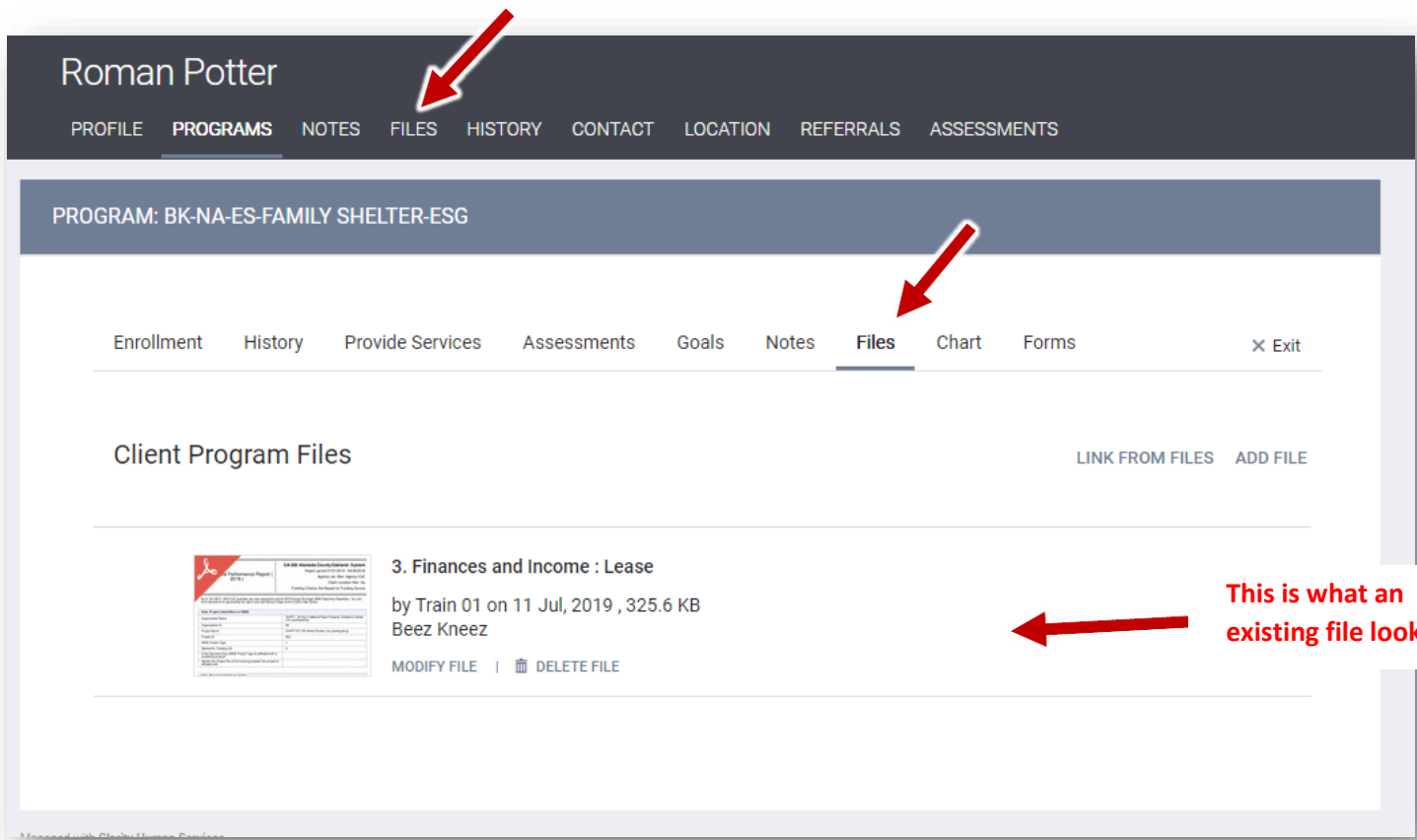
Uploading Files and Documents

Files and documents can be such as housing documents, birth certificate, photo ID, medical record, and many more can be uploaded to HMIS. Files can be uploaded in a variety of common file formats.

Two Places to Upload Files

Notice there are two places to upload files in Clarity. Similar to Case Notes one is located under the client name and one under the program name in an enrollment. The FILES tabe under the client name only associates that file with the agency, while the FILES tab in the enrollment associates the file with a program entry. When possible use the FILES tab under the program entry.

Do Not Mark Information as Private

You may see a "Private" switch under files or in other areas of HMIS. Do not mark information as private. Marking as private will prevent others from accessing that data.

Other Case Management Functions

The Clarity software has many features and tricks to aid in case management, program management, and other record keeping. A few of these features will be highlighted in this section. Additional information can be found at https://get.clarityhs.help.

Assigned Staff Member

The assigned staff member should always be set to the individual that is responsible for this client's record. A new assigned staff member is set for each program enrollment. By default, the assigned staff is set to the individual that entered the program enrollment but this can be easily adjusted.

To view or edit the assigned staff Member open the client profile and then the program enrollment that you are interested in. On the righthand side of the screen is a box with some helpful information including: program type group/individual, start date, head of household, and assigned staff. Use the edit button next to the assigned staff to change this value.

The assigned staffperson will receive email notifications when the client is due for annual assessments or other appointments. The assigned staff will also be able to manage the client or household from their CASELOAD screen. The CASELOAD screen which will be discussed in the next section.

Caseload Screen

The caseload screen allows any user to view and manage all clients assigned to them. Clients are assigned via the assigned client field in the program enrollment. This was discussed in the previous section.

From the Caseload screen you can view all the clients assigned to you by program. You can also see which clients are due for an annual assessment.

Accessing the Caseload Screen

You can access the caseload screen by clicking on the CASELOAD button near the top right of the Clarity Homepage.
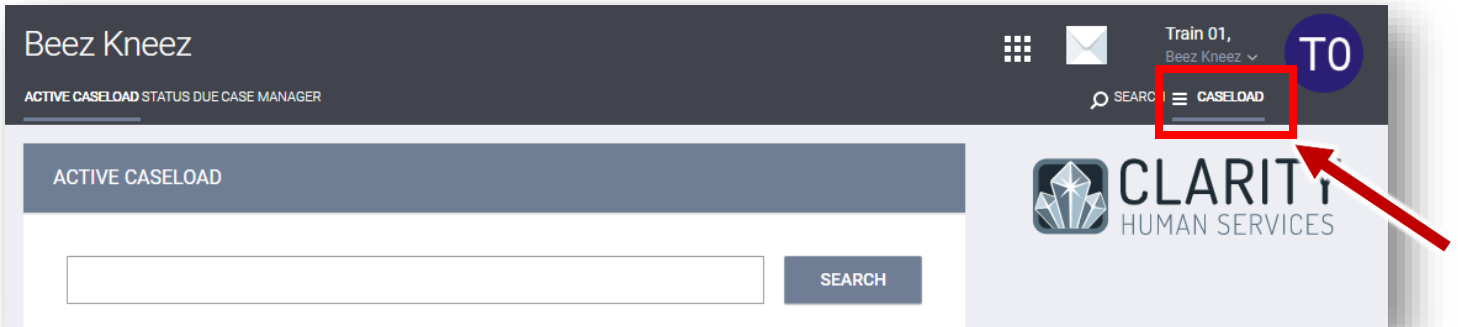
Sending Messages to Other Staff

Messages can be sent to any other active user in Clarity. To send a message click on the Mail icon near the top right of the screen. Click New Message the select the agency and individual you would like to send to. The receiver will get a notification on their clarity homepage and a message in their email.
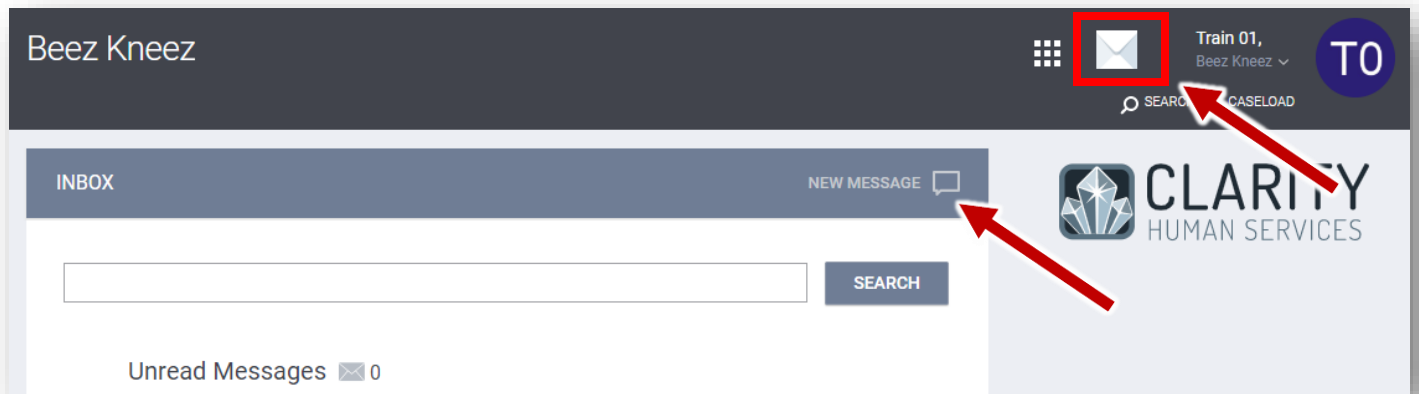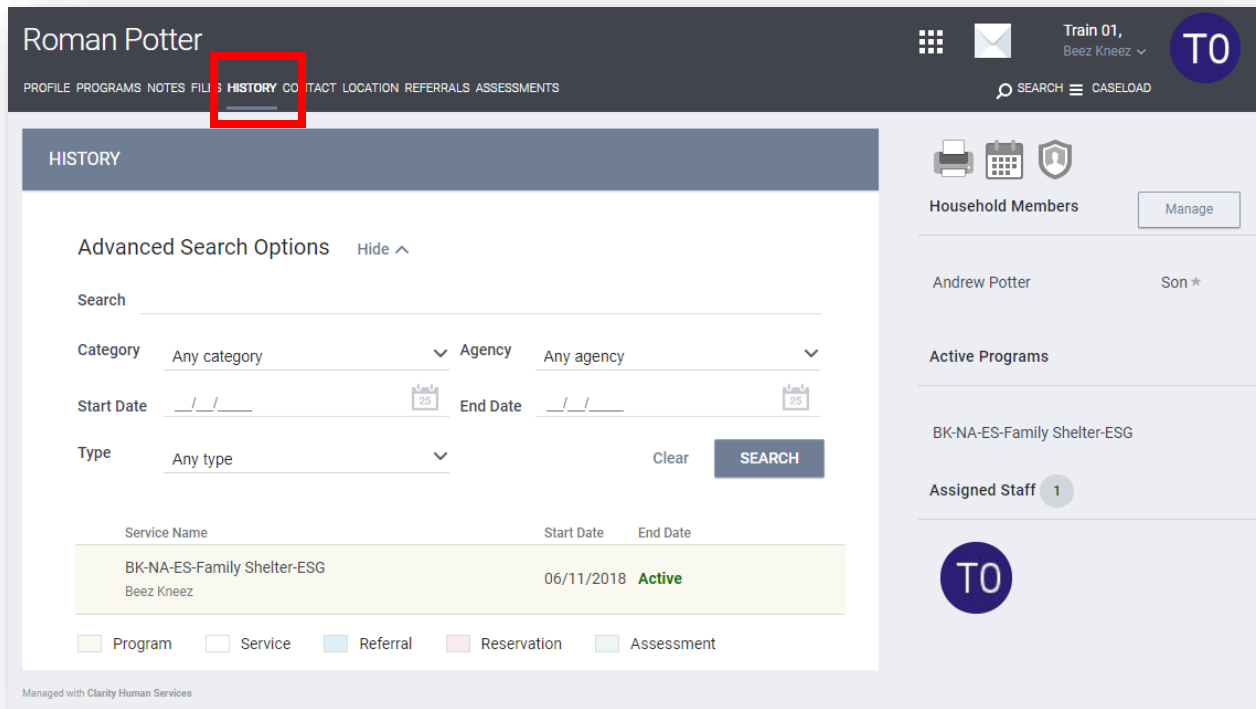
Accessing and Printing Client Service History

Access to the clients full service history is can be done from the HISTORY tab or via CLIENT REPORTS. See below for an explanation of each of these.

Client History

The full client history is accessed via the HISTORY tab on the client profile. This tab will show a full history of every Program, Service, Referral, and Assessment associate with the client. Additional Advanced Search Options are available to filter and drill down on specific information.

Client Records

Client records can also be accessed via the CLIENT REPORTS section. Here you can print and export information to excel. To access the client reports, click on the Printer icon near the top right of the client profile.

From the CLIENT REPORTS page, you have access to a variety of reports that allow for detailed information on a single client. Click run on the report of interest to see additional options.

Project Exit

An HMIS Project Exit is required for all clients when the client's period of participation in that project ends. When entering a project exit start with the head of household. Open the Head of household's profile in Clarity.

Project Exit Walkthrough

Starting on the Programs tab of the Head of Household, locate the program enrollment that will be exited. Click the pencil icon next to that enrollment to open the enrollment page.

1. Click on the "⤫ Exit" button located near the right side of the page
2. Select the clients to exit from the program
   a. Use the switches to include all household members that will be exiting
   b. Click END PROGRAM to proceed
3. On the Next Screen(s) update all fields so that information is accurate as of the Exit Date
   a. Confirm that the Exit Date is accurate
4. Save the Exit and repeat step 3 for each household member

Public Alerts

Public alerts are used to create a notice on the clients profile that will alert others. Public alerts appear as yellow band across a client profile. Public alerts will not be pushed out via email or other notification, they are only visible by visiting the client profile.

To add a Public Alert click on the NOTES tab under the client name then click ADD ALERT.

Clarity Reporting

Aggregate and detailed reporting in HMIS can be an incredibly useful tool for program management, data quality monitoring, research, funding allocation, and more. To access the Report Libraty in Clarity click on the square launchpad in the upper right of the screen then click on reports.
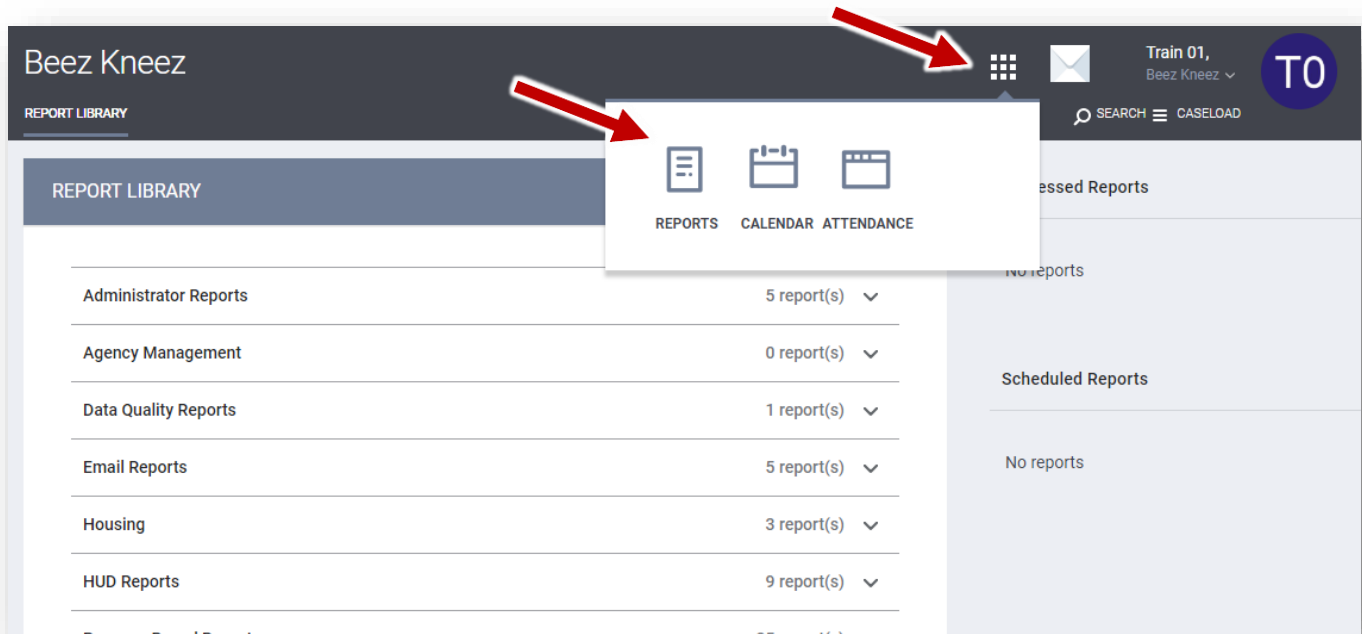

A variety of pre-built reports are available in clarity that vary in kind and use. This manual will only cover a few of these reports.

APR (Annual Performance Report)

The APR (annual performance report) is a comprehensive summary of your program data that is used nationwide to assess homeless and housing services.

The APR is located under the HUD Reports section of the Report Libraty. Find the report labeled Annual Performance Report and click "> RUN."
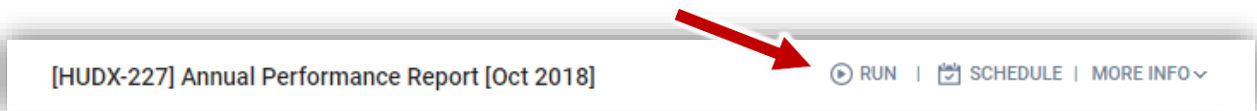
APR Report Parameters

On the next page you will see a variety of options related to your report. These report parameters tell the database exactly what information you are looking for. In the screenshot you will see an example of common parameters for the APR, however these will vary depending on what information you are interested in.

NOTE: While the APR is traditionally run for an entire calendar year (e.g. 6/1/18 to 5/31/19), it can also be run for a month, week, or a single day.

Custom Reporting (Looker)

Clarity includes a module called Looker Data Analysis that allows for the development of custom reports and dashboards. For more information email hmissupport@acgov.org.

Coordinated Entry

Entering a Coordinated Entry Assessment

1. Switch to the Coordinated Entry Agency
   a. Use the agency switcher located under your username in the upper right
2. Open the Client Profile for the Head of Household
3. Click on the Assessments tab
4. Click START to start a new Coordinated Entry Assessment
   a. You may also edit an existing assessment

Glossary of Terms

- **Annual Assessment –** Is an 'update' to a housholds record that occurs at the anniversary (+/- 30 days) of the start date in that program.
- **APR (Annual Performance Report**) – A standard report used to assess homeless programs across the country. The APR provides a wide range of aggregate data for a program or group of programs including demographics, income, length of stay, exit status, and many more.
- **BitFocus Inc.** – The private company that is contracted to provide the Alameda County HMIS software. BitFocus is the developer of Clarity.
- **Clarity Human Services** (Clarity, ClarityHS) – The name of the software, developed by BitFocus, that is used in the Alameda County HMIS.
- **Enrollment (Project Enrollment, Project Entry, "Program Stamp")** – This data element defines an individual's involvement with a program, including start and end dates.
- **EveryoneHome** - Is the countywide entity coordinating housing services to end homelessness in Alameda County.
- **HMIS (Homeless Management Information System**) – A computer system that collects information about homeless and housing services. HMIS standards are defined at the federal level by HUD and implemented locally.
- **Homelessness –** HMIS standards use the HUD definition of homelessness which includes an "individual or family who lacks a fixed, regular, and adequate nighttime residence…" For more information on the complete definition see here https://www.hudexchange.info/resource/1974/criteria-and-recordkeeping-requirements-for-definition-of-homeless/.
- **HUD (The U.S. Department of Housing And Urban Development)** – This is the federal agency that develops HMIS guidelines and is the source of many millions of dollars of funding used for homeless services throughout the county.
- **Looker** – Looker is the software used to develop custom reports and analysis through Clarity. Looker is not covered in this user manual.
- **PPI (Protected Personal Information)** - Any information maintained by or for a Covered Homeless Organization about a living homeless client or homeless individual that: (1) identifies, either directly or indirectly, a specific individual; (2) can be manipulated by a reasonably foreseeable method to identify a specific individual; or (3) can be linked with other available information to identify a specific individual.
- **ROI (Release of Information)** - An agreement signed by the client giving permission to share basic information data with other participating agencies/jurisdictions.
- **HMIS User Agreement** - An agreement signed by all licensed users of the Alameda County HMIS system specifying the terms of being, and maintaining status as, a licensed user.