Welcome to Clarity Human Services!

On behalf of Bitfocus, Inc., I would like to extend a warm welcome to Cambridge, Massachusetts. 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.
# TABLE OF CONTENTS

1. Privacy & Security .................................................. 1
2. Searching for a Client .............................................. 3
3. Adding a New Client ................................................ 4
4. Release of Information ............................................. 6
5. Creating Family/Household Groups ......................... 8
6. Adding Address & Contact Information .................... 11
7. Enrolling Clients into Programs ............................... 12
8. Program Service Transactions ................................. 14
9. Completing Assessments ......................................... 17
10. Exiting Clients from Programs .............................. 18
11. Program Tab Overview .......................................... 19
12. History Screen Overview ....................................... 21
13. Case Notes .......................................................... 24
14. Uploading Files ..................................................... 25
15. Daily Attendance Service Transactions ................... 27
16. Reporting ............................................................. 32
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. Please take this time to think of your new password. It must meet the following criteria:

- 8-9 characters in total length
- Contain upper-case letters (i.e., H)
- Contain lower-case letters (i.e., h)
- Contain Numbers (i.e., 9)
- Cannot contain your first or last name

Example of an acceptable password: SampleP12  (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.

Each HMIS user is also required to submit a signed receipt of privacy notice/user policy prior to system access.

HMIS Computer Requirements

- Computers 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 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 are outfitted with the latest version of the Web Browser you use.

The following web browsers are supported by Clarity:

- Microsoft - Internet Explorer 11
- Mozilla - Firefox 10
- Google - Chrome 47
- Apple - Safari 9.0.2
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.
- Every location that HMIS Intake is being done requires a clearly visible desk sign.

2. Searching for a Client

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

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

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

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

3. Adding A New Client

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

In this 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.

**Don't Know/Refused/Data Not Collected:**
Selecting “Don’t Know”, “Refused”, or “Data Not Collected” is acceptable and will allow you to save the file. However, each field on this screen makes up the overall data quality percentage for this client. Not making a valid selection in each field will lower the data quality for this client and impact overall data quality percentages for your agency as a whole.
4. Release of Information

Once the Create a New Client Screen opens, the Release of Information box will be located at the top right of the screen.

A Compliance Warning ribbon will appear across the screen of any client profile that has an expired ROI form, or an ROI form that is about to expire. Select the ‘Click Here’ link to update the ROI.

The Release of Information Screen will appear. Complete the following data fields:

- **Permission**
  - Yes = Client provided consent
  - No = Client did not provide consent

- **Start Date**
  - This is the date that the client signed the ROI. The “Start Date” defaults to today’s date, but it must be configured to reflect the actual date the ROI was signed by the client, if it was not signed on the current day.
• **End Date**

This is the date that the ROI will expire. It will default to the expiration date configured by the HMIS System Administrator.

• **Documentation**

Enter the way in which the ROI was stored. There are several options:

- **Electronic Signature**: If Electronic Signature is selected, a black button stating ‘e-Sign Document’ will be present. Click on it to complete the electronic signature form. The client can sign the form with their finger/stylus.

- **Attached PDF**: This will prompt the end user to upload the PDF, which must have the client signature.

- **Verbal Consent**: Select if consent was verbally given by the client.

- **Household or Group Member**: Select if the client is a minor and an adult household/group member signed the ROI.

- **None**: Select if no ROI was obtained.

- **Select “Add Record”** once all data fields are complete.

To verify the form uploaded correctly, click on the “Shield” icon, next to the client calendar and print icons. This will open the Release of Information screen and you can review the form on this screen.

*Note: Only one ROI per agency per active start/end date range is permitted. The system will not allow you to upload a second ROI within the same date range.
Once the completed ROI has been uploaded, the Warning Ribbon on the client’s profile will be removed, and will only prompt when the ROI expires.

5. 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 file for the head of household. In the upper right corner, under the header “Family/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 “Add” to add them to the head of households 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 group, you are given the option of joining your client to the existing group.

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

From the search results, mouse over the client name to produce the "Add" option.

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.

Select the "Exited Household" box, enter the date the member left the household, and click "Save". This will remove them from the household and retain a historical record of their time in the group.

In this example we have ended Paul Dormer’s time in the household as of 8/18/15.
6. Adding Address & Contact Information

Click on the “Location” tab in the client file. Click “Add Address”.

Complete contact information and Click “Add Record”.

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.
7. 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 current programs provided by 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.
If the client is part of a group, you will be given the option to checkmark any group members who should also be included.

Select the group members to include (if applicable) and click “Enroll”. In this example we are enrolling both Michael Jones and his son Carl Dormer.
It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to the required APR for your program(s).

In the example above, required program fields were left blank illustrating required data elements in order to save the client enrollment.

Complete ALL fields in the enrollment page for your client and click “Save & Next”. If you had check marked any group members to be included in this program, their Enrollment page will automatically come up next until each member’s enrollment has been completed. Continue to click “Save & Next” after completing each group member’s Enrollment. Enrolled group members will be listed in the right side bar under “Program Group Members”.

8. Program Service Transactions

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 and checkmark any group members who should also receive this service.

Click “Submit” to complete the service placement. In this example we have provided only the head of household with Case Management.

Continue providing the client with any additional services that are being provided via this program by following the above steps.
When you have finished, both the program enrollment and associated 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 “Edit”.

Select “Provide Services” and follow the above steps for Placing Services.
9. Completing 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) or once per year (for Annual Assessments). Please check your contract for specific requirements.

From the Programs tab, the right side menu contains the header "Program Assessments".

Click "Add" to complete a new Status Assessment or Annual Assessment.

If this is a group case, 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.
10. Exiting Clients from Programs

All clients must be properly exited upon completion of the program.

From the Programs tab in the client file, find the program you wish to add a household member to and simply click Edit to the left of that program to access.

If this is a group case, you will be prompted to select which household members you would like to exit from the program.

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

At the bottom of the screen under the header “Open Services” make any needed adjustments to the service dates associated with this program stay.
If you had check marked any group members to also be exited from this program, their End Program page will automatically come up next until each member has been completed. Continue to click “Save & Next” after completing exit information for each group members.

11. 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
- End - 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.

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

- Option to add Assessments or edit/view existing.
12. 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 olive green tone to separate them from regular 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, the “Show advanced search options” feature provides an excellent interface to narrow down your results. The advanced search options allows the following criteria:

• Name - 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
By clicking Edit 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 Edit on a Program will place you directly into Program management.

The Edit screen contains the following:

- Service details including Start and End Date
- Expenses associated with this service
- Option to add notes to this service
- If this is a group placement, you have the option to edit the members' service also
**Attendance** - Services utilizing the Multiple Attendance or Attendance delivery method will be presented with the Attendance section at the bottom of the service history page. The section will list in a scrollable area of individual date entries. You may check a batch of dates, and click the “Delete selected records” link, or you may click the trashcan icon on individual dates. Selecting “Also apply to the following group members” will also delete individual entries from the group member for this service if any were in place.

*Note:* For full instructions on the Attendance delivery method, see page 28 below.

### 13. Case Notes

To add a case 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.

Within the body of your note, you have the ability to use bold or italic text and bullet or numbered points.

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

14. Uploading Files

**NOTE:** This section will assume you have previously scanned and saved documents into separate files that are accessible through your computer.
Click on the Files tab in the client’s record 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 closest resemble 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.

Click “Add Record” to complete the upload and save.

The file will be listed by category and name with a small thumbnail image.
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.)

15. 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 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 setup for daily intake.

After clicking on the Attendance button, a list of services available for daily intake is provided.
Select the desired service from the list by clicking on "Manage" when you mouse over the service title.

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 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.
To check in clients who have not been in attendance during the last 4 months you will use the Client Search located in the upper right corner of the Attendance screen.

In the search results, click on the + symbol (if applicable) to display all family/household members.

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” found on page 4 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, use the Scanned button to upload your data file.
16. 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. In the example below ([OUTS-105] Client Demographics report), the required parameters are:

- Choose services
- Housing Status at Entry
- Veteran Status
- Starting Date
- Ending Date
- Report Format
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.

Every report will also 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.)

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.
Alternatively, you can open the report from the report notification button.

Scheduling a Report

Reports can be run immediately, or they can be scheduled to run at specified times. To schedule a report, select the ‘Schedule’ link instead of the ‘Run’ link.
This will take you to the Preview page where you can select the process date for the report. Use the same directions as above for selecting the parameters.