Clarity Quick Resources Reference

HMIS Guides, Forms, Help Content, Support, and more for WA State HMIS Balance of State Users

Bookmark & Visit our HMIS webpage: www.commerce.wa.gov/hmis

- Access & New Users: Read the HMIS Training Catalog and HMIS Training FAQ
- Understanding HMIS fields: HUD Data Standards Manual and HUD Program Manuals.
- **Consent Refused (Anonymous) Data Entry:** Consent Refused HMIS Data Entry Guide **and** HMIS Guidance for Domestic Violence and Consent Refused Providers
- HMIS Vendor Help Portal: Clarity Getting Started

The list below is ok for WA State HMIS Balance of State Users. Some of the vendor's help portal topics pertain to features we do not use at Commerce so please ignore those topics not listed.

Getting Started With Clarity Human Services

- Working with Your Staff Profile *(do not change setting, contact our HMIS Helpdesk)*
- Working with User Passwords *(update password every 6 months or more)*
- Working with Two-Factor Authentication (2FA) *(contact our HMIS Helpdesk for Commerce instructions)*
- Working With Your Staff Inbox & Secure Messaging

Working with Clients

- Switching Agencies in Clarity
- How do I search for a client?
- How do I create a new client?
- How do I create a family/household and manage members?
- How do I create and maintain addresses for my client? *(Must be consenting household only)*
- How do I create a public alert?
- How do I upload and work with files/forms?
- How do I create case notes for my client?
- How do I manage a client's history?

Working with Programs

- How do I remove a program exit record?
- How do I enroll a client/household into a program?
- How do I add a new household member to the Program?
- How do I conduct a status assessment?
- How do I manage a client's general Program History?
- How do I receive "Status Assessment Due" notifications?
- How do I place program services to a client and household members?
- How do I manage a client's program service history?
- How do I link a service to a program?
- How Do I Reassign a Case Manager?
- How do I exit a client from a program?

Working with Attendance & Reservations

The Attendance Feature for NBN ES shelters only.

- How do I Manage Client Attendance from the Attendance Screen?
- How do I manage Attendance from client history?

Working with Reports

- How do I run a report?

Additional Resources

- Additional Resources: PATH Basic Workflow Document
- Continuum of Care (CoC) Programs (SHP, S+C, SRO) Sample Forms
- PATH (Project to Assist in the Transition from Homelessness) Sample Forms
- RHY (Runaway and Homeless Youth) Programs Sample Forms
- VA SSVF (Supportive Services for Veteran Families) Programs Sample Forms

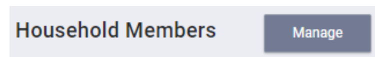
Clarity HMIS –Basic Steps Cheat Sheet

When in Doubt or Feel Lost….Click the Search Tab to find your "home page."

Create Client Profile

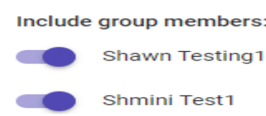
- **Search** for Client (do not search by name for consent refused clients. Use HMIS Id if possible).
- If not found, **Add Client**. *Consent Refused Data Entry Instructions are on our HMIS webpage* *http://www.commerce.wa.gov/hmis*
- Complete Client Profile, Save, **copy/paste HMIS unique identifier in alias field**, Save.
- Complete and Update Client Profiles for **all Household members** before moving on.

Create a Household (Group)



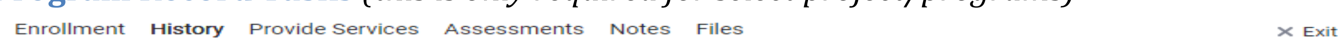
- Be on the Head of Household (HoH) Client Profile.
- Click on the Household Members **Manage** button
- Recently added clients are listed in Bottom Right of screen. Do not click on the client name. Only hover over name of additional HH member to click the **Plus** symbol.
- Member Type = **Not Set**. Start Date = **program enroll date** or today if not enrolled yet.
- The added member is listed under Household members now. The STAR next to a name in the upper right side = HOH. If wrong, fix it using the pencil icon.

Enrolling in Program



- From the HOH profile, Click on **Programs** tab
- Click drop down **Arrow** for enrollment Program
- Are all HH members enrolling together? If so slide button to "**Include group members**" (lower left)
- Click **Enroll** button
- Check the upper right to ensure all HH members are listed before next step. If not, you forgot to "Include group member." Go back a step and choose all HH members.
- After completing Enrollment Form for HOH, you will be automatically prompted to complete all enrollment forms for the other HH member.

Program Record Tasks *(this is only required for select project/programs)*



- From the client profile, click on **Programs**, under Program History hover over the **active program** to edit and click **pencil ion**.
- **Enrollment** = to correct original enrollment answers
- **Assessments** = to complete Status and/or Annual Assessments. Status Assessments are due when any changes to the enrollment answer happen during program stay.
- *Provide Services = only for projects/programs that need to track Services. (Take the HMIS Service Entry Training for more instructions).*
- Notes: to create case notes
- Exit = to track program exit.
- **Assigned Staff**: click on the pencil icon to change the case worker name

Exit from Program

- Review all Client Profile data, Household information, Enrollment and any assessment data first.
- From the **HoH** Client Profile, click on **Program** tab.
- Hover of the active program and select **pencil icon** to edit.
- Click **Exit** on the far right.
- Answer all exit questions, save and more on to additional HH members.
- Once exited, you can only edit Enrollment, Assessments, Notes, and Exit data. *Services cannot be edited without reactivating the program record. Contact the HMIS Helpdesk for assistance.*