

# MeckHMIS End User Guide for Clarity Human Services - Bitfocus

## TABLE OF CONTENTS

<b>TABLE OF CONTENTS</b> .....	1
Using the Guide and Bitfocus Website .....	2
Crosswalk of Terms .....	3
Client Consent and Notification .....	3
Locating Client Files in Clarity.....	4
Searching for a Client.....	4
Recent Client Searches .....	5
Adding a New Client.....	5
Client Contact Information .....	6
Managing Privacy Settings.....	6
HMIS Release of Information.....	7
Data Collection and Data Sharing.....	8
Managing Families and Household Groups .....	8
Creating a Household Group .....	8
Exiting a Household member.....	10
Joining and Rearranging Households .....	11
Program Enrollment .....	12
Creating a Program Enrollment.....	12
Making an Enrollment Private.....	14
Ending a Program Enrollment .....	15
Additional Program Types .....	16
Assessments.....	16
Status Updates (previously known as Interim Reviews).....	16
Annual Assessments (previously known as Annual Reviews) .....	16
Agency and Program Specific Assessments .....	17
Providing Services.....	17
Documenting Services .....	17
Assigning Staff and Care Team Management.....	19
Assigning Staff.....	19
Care Team Management.....	20
Additional Program Documentation.....	23
Client Case Notes.....	22
Notes.....	22
Public Alert .....	24
Coordinated Entry Events.....	25
Referral Management .....	26
Attaching a File .....	29
Exit and Exit Destination .....	30
Prior Living Situation, Current Living Situation, & Exit Destination Guidance .....	30

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# MeckHMIS End User Guide for Clarity Human Services - Bitfocus

This guide is intended to serve as a resource and reference guide to assist end users at HMIS participating agencies engage in the basic functions of Clarity Human Services - Bitfocus software.

## Using this Guide

- This guide provides instructions and reminders to support users as they familiarize themselves with basic Bitfocus functions. This guide is limited to basic functionality and users seeking certain program-specific guidance and/or more advanced functions such as reporting should refer to the MeckHMIS help desk: [HMIS@MeckNC.Gov](mailto:HMIS@MeckNC.Gov)
- The screenshots included in this guide are from a training site account under the username “Generic User” who works at the “Generic Agency.” Actual users will log in under their assigned Username and will have access to their own set of Agency specific Programs, Services, and other features. If agencies have questions about their set up in Bitfocus , please reach out to your System Administrators via the HMIS help desk.
- Red arrows, red circles, and yellow highlighting help identify the relevant parts of the included screenshots.
- When referring to Bitfocus specific terminology words or phrases such as “Program,” “Services,” and “Current Living Situation” are capitalized.

As a MeckHMIS end user you will have access to both the:

Clarity Human Services - Bitfocus Training website: <https://mecknc-train.clarityhs.com>

Clarity Human Services - Bitfocus Live website: <https://mecknc.clarityhs.com/login>

Please note: The training website is utilized to practice entering clients and assessments into HMIS without worrying about messing up real client data. This training site is designed to mirror the live site with the exception that client level information is fictitious. You should never enter any actual client level data into the training site.

## CROSSWALK OF TERMS

OLD Term (from ServicePoint)	NEW Term (In Clarity)
Parent Provider	Agency
Project / EDA Provider	Program
ClientPoint	Landing Page / Search for Client
Client ID	Unique Identifier
Entry / Exit Assessment	Enrollment
Interim Review - Update	Status Assessment (update)
Interim Review - Assessment	Status (assessment)
ShelterPoint	Attendance Module
Case Managers Tab	Assigned Staff / Care Team
Summary Tab	History Tab
Entry / Exit Tab	Programs Tab
Canned Reports	Reports / Report Library
Data Element	Field

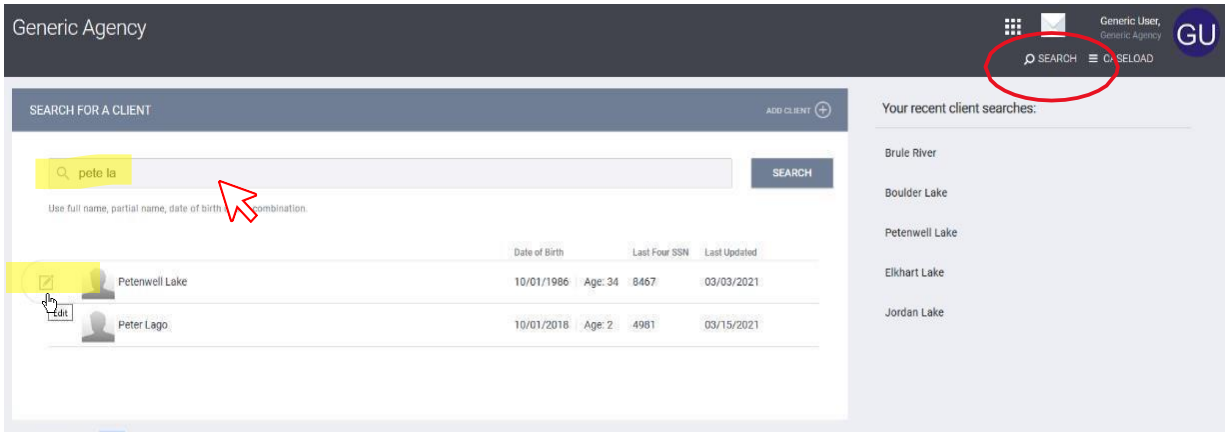
## CLIENT CONSENT AND NOTIFICATION

1. The HMIS Consumer Notice must be posted in any area in which client information is collected or entered into HMIS.
  - a. This includes offices, office areas, conference rooms, meeting rooms, clipboards for outreach workers etc.
  - b. It is also best practice to have the Consumer Notice posted in areas where clients go to seek information, such as a bulletin board or pamphlet display.
2. Personal information must be collected **with the knowledge and consent of clients**. It is assumed that clients consent to the collection of their personal information as described in this notice when they seek assistance from an agency using HMIS and provide the agency with their personal information.
  - a. If you are collecting client information over the phone you must verbally inform the client that their information will be entered into HMIS. The client cannot see the Consumer Notice over the phone, so your agency cannot infer their consent.

## LOCATING CLIENT PROFILES IN BITFOCUS

### *Searching for a Client*

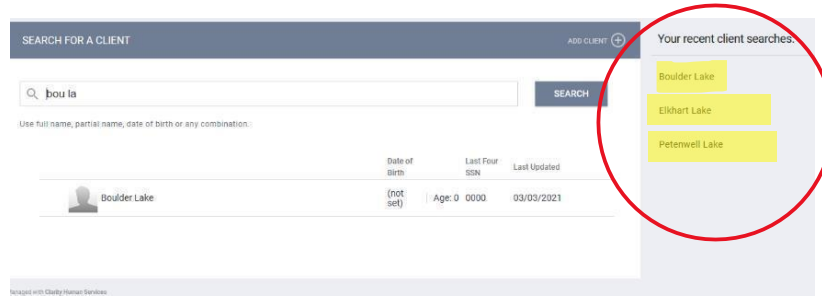
1. The first step to data entry is to verify if the client already has a record in the HMIS database.
2. Upon log in, you will land on the Client Search page. Users can also navigate to the Search page by clicking the Search button in the top right of the browser window.



3. To search, enter the client's information into the Search bar.
4. It is possible to enter "full name, partial name, date of birth (DOB), or *any combination*."
5. In most cases, using partial names in a search query is advised as it reduces the chance of minor spelling variations omitting the client from the query results.
6. For example, as seen above, "pete la" correctly returns the desired client, Petenwell Lake. Of course, more common names may require more specificity.
7. Bitfocus recommends using the first three letters of both the first and last name.
8. If an initial query does not locate the client, it is important to try other combinations including options involving the Date of Birth (DoB) or the last four of the SSN.
9. Check that all unique identifying information matches before selecting a client.
10. If you identify potential duplicate files, please notify your System Admin.
11. To select a client hover over their name until the Edit icon, a small pencil, appears to the left of the name. Click the icon.
12. All household members must exist in the system before moving on to family /household creation or program enrollment.

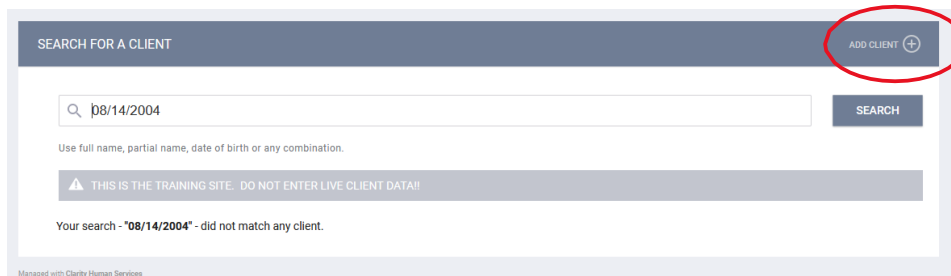
## Recent Client Searches

1. Recently viewed client files appear on the right-hand side of the browser window. These client files can be accessed directly by clicking the client's name.



## Adding a New Client

1. Once potential search combinations are exhausted, and you are confident the client is NEW to HMIS, you may proceed with creating a new client file by clicking Add Client.



2. The next screen has a series of prompts, all of which **must** be answered before clicking Add Record. These are HUD required field and with limited exceptions these values should be known and fully documented for all clients.

The screenshot shows the 'CLIENT PROFILE' form. It contains several fields for client information:

Social Security Number	XXX - XX - 1111 ?
Quality of SSN	Full SSN Reported
Last Name	Test
First Name	Tom
Quality of Name	Full name reported
Quality of DOB	Full DOB Reported
Date of Birth	01/01/2000

On the right side of the form, there is a placeholder for a client photo. Below the photo, there is a 'UNIQUE IDENTIFIER' field with the value 'E2EF6116C' and a 'General ID' field with the value '15007'.

3. After this information has been entered it will appear under the Profile tab in the client's HMIS file.

### **Client Contact Information**

1. Whether creating a new client file or updating an existing one it is important to ensure the client Contact information is current.
2. Contact information is viewed under the Contact tab.

The screenshot shows the Petenwell Lake HMIS interface. At the top, there is a navigation bar with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The 'CONTACT' tab is highlighted and circled in red. Below the navigation bar is a section titled 'ADD CONTACT'. This section contains a form with the following fields: 'Contact Type' (a dropdown menu currently showing 'Client'), 'Email' (a text input field), and 'Phone (#1)' (a text input field with a placeholder 'XXX-XXX-XXXX').

Clicking Add Contact allows you to enter new information.

3. Clicking the pencil next to an Existing Contact allows you mark an existing record as Inactive. Please do not delete old records. Incorrect information may be fixed but changes should instead be documented with a new Contact.

## **MANAGING PRIVACY SETTINGS**

### **Default Sharing Settings in HMIS**

1. The HMIS database is an open system that defaults to sharing client records across all agencies.
2. Most programs have the following default Sharing settings:
  - a) Full Shared – Users outside of your Agency can view all details but cannot edit records.
    - i) Clients
    - ii) Programs, Services, Assessments, Events Placed
    - iii) Files
    - iv) Location
  - b) Basic Shared – Users outside of your Agency can see that records exist but cannot view the details or make any edits.
    - i) Notes

## Release of Information (ROI) in HMIS

The HMIS Release of Information (ROI) is administered through the Privacy Shield on the client Profile screen:



The link below provides a listing of agencies who may be included in the discussion of cases to better connect clients to resources they may qualify for. This list is updated each time an agency is added to or removed from the sharing agreement.

<https://z4b66d.p3cdn1.secureserver.net/wp-content/uploads/2024/01/Sharing-Agencies-Jan-2024.pdf>

## Start and End Dates

A screenshot of the 'RELEASE OF INFORMATION' form. The form has a dark blue header with the text 'RELEASE OF INFORMATION'. Below the header, there are four rows of form fields. The first row is 'Permission' with a dropdown menu set to 'Yes'. The second row is 'Start Date' with a date field showing '01/16/2024' and a calendar icon. The third row is 'End Date' with a date field showing '01/16/2034' and a calendar icon. The fourth row is 'Documentation' with a dropdown menu set to 'Select'. A dropdown menu is open below the 'Documentation' field, showing options: 'Select', 'Electronic Signature', 'Attached PDF', 'Signed Paper Document', 'Verbal Consent', 'Outside Agency Verified', 'Household', and 'Group Member'. A 'CANCEL' button is visible to the right of the dropdown menu. At the bottom left, there is a small text 'naged with Clarity Human Services'.

The Start Date is the beginning effective date of the ROI. The Start Date value defaults to today's date but it can be changed if applicable.

The End Date is the date when the ROI will expire.

If Permission = "Yes," the End Date is auto-filled 10 years out; **Note:** our communities ROI is active in perpetuity or until revoked.

If Permission = "No," the End Date is optional.

## ***Documentation***

The Documentation field indicates the method for collecting the ROI. The following options may be available, based on system configuration:

- **"Electronic Signature"**: If you select this option, an E-SIGN DOCUMENT button appears. Click on the button for the client to sign the form electronically. The client can sign the form with their finger or a stylus. The system will not allow the user to save the form until a signature is applied to the electronic signature field.
- **"Attached PDF"**: If you select this option, a Select File button displays, allowing you to upload a file.
- **"Signed Paper Document"**: If you select this option, a Location text box appears for you to describe where the document is stored.
- **"Verbal Consent"**: Select if the client verbally gave consent.
- **"Outside Agency Verified"**: If you select this option, a Location text box appears for you to describe where the document is stored.
- **"Household/Group Member"**: Select if the client is a minor and an adult household/group member signed the ROI.
- **"None"**: Select if there is no ROI documentation.

## ***Data Collection and Data Sharing***

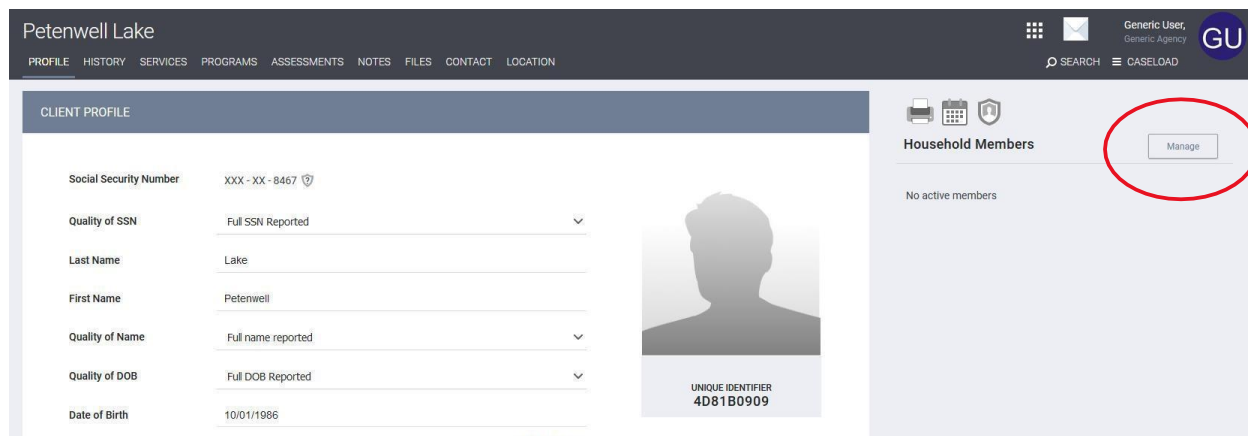
1. Personal information must be collected with the knowledge of the client. It is assumed that clients consent to the collection of their personal information as described in the Consumer Notice when they seek assistance from an agency using HMIS and provide the agency with their personal information.
2. To share data in the HMIS, a client will need to sign the current and approved Release of Information. All clients should be given the option to share and make their own decision. The ROI should then be uploaded into the HMIS, so other agencies are able to see that an ROI was signed. Copies of the ROI are available via the HMIS help desk and detailed instructions on how to upload the file are in the 'Attaching a File' section of this guide.

## **MANAGING FAMILIES AND HOUSEHOLD GROUPS**

### ***Creating a Household Group***

1. Navigate to the Head of Household's (HoH) file.
2. Click the Manage button at the top right of the screen.





3. This opens the Manage Household window where you can build a household by joining existing client files.

Reminder: All household members must exist in the system before moving on to family/household creation or group Program Enrollment.



- a. Locate the desired client via the Search for a Household Member search bar and hover over the correct query result until the Add icon appears. Where applicable you may instead use the Recent Client Searches list. Hover over the client's name until the Add icon appears.
  - i. **Note:** you must click the Add icon. If you instead click the name itself, you will be redirected to that client's page.
- b. If you are unable to locate a client when searching for a household member you will need to return to the Search page and follow the Add Client process outlined above.

4. Clicking Add opens a pop-up window where the client's relationship to the HoH is selected from a pick list and their household Start Date is entered.

5. Repeat these steps for each household member until all are entered and appear in the Household Members list on the upper right corner of the browser window. A small star will indicate the HoH. When necessary, this can be amended by clicking on Edit button.

Household Members	
Petenwell Lake	Wife *
Boulder Lake	Husband
Elkhart Lake	Daughter

***Exiting a Household member***

- Clients should only be exited from a household if:
  - The client has been exited from all programs and is joining a different household or being served as an individual.
  - If they are actively enrolled in other programs as a household: Exit the client from your program but not from the household on the profile

1. To exit a member from the household, click their name in the Household Members list and engage the Exited Household toggle. You will then be provided a field to enter the date the client’s involvement with this household ended. It is important to remember that you will only exit a client if they are not actively enrolled in any other program.

EDIT GLOBAL HOUSEHOLD

Member Type: Husband

Head of Household: Petenwell Lake

Joined Household: 03/15/2021

Exited Household:

SAVE

March 2021

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

2. If the person exiting the Household is the HoH, a new HoH must be selected.
3. The record of this past household history will now appear in the Previous Household History section of the client's Household Management window accessed by clicking the Manage button.

### Joining and Rearranging Households

1. When attempting to add a client to a household who is already a member of a different Household, instead of seeing the plus sign when attempting to add, you will see a merging arrow icon. Clicking this opens the Join Household pop-up window.

HOUSEHOLD MANAGEMENT

Search for a Household Member

lake SEARCH

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

Client	Date of Birth	Last Four SSN	Last Updated
>> Join Boulder Lake Existing Group. Head of Household: Brule River. Members: 3	10/01/1981	2345	03/03/2021
Elkhart Lake	10/01/2004	4831	03/03/2021
Jordan Lake	10/01/2004	5468	03/08/2021

2. In the pop-up window follow the prompts to choose the direction of the client's movement between Households

JOIN HOUSEHOLD

Active client is already in a Household. This action will end involvement in the current Household and add as a member of the selected Household.

Active client Petenwell Lake will leave the existing Household to join Brule River's Household

Transfer Brule River from their existing Household to this Household

EXISTING HOUSEHOLD

Existing End Date 03/15/2021

Head of Household Elkhart Lake

NEW HOUSEHOLD

Member Type Not Set

Start Date 03/15/2021

SAVE

3. **Note:** It is especially important when “Joining” that upon completing this step you confirm that all intended household compositions are accurately reflected in the relevant Household Members lists.

## PROGRAM ENROLLMENT

### Creating a Program Enrollment

1. The Programs tab contains information about current and past Enrollments.
2. The first section includes the Program History. This is a list of the programs the client is either currently enrolled in or was enrolled in previously.

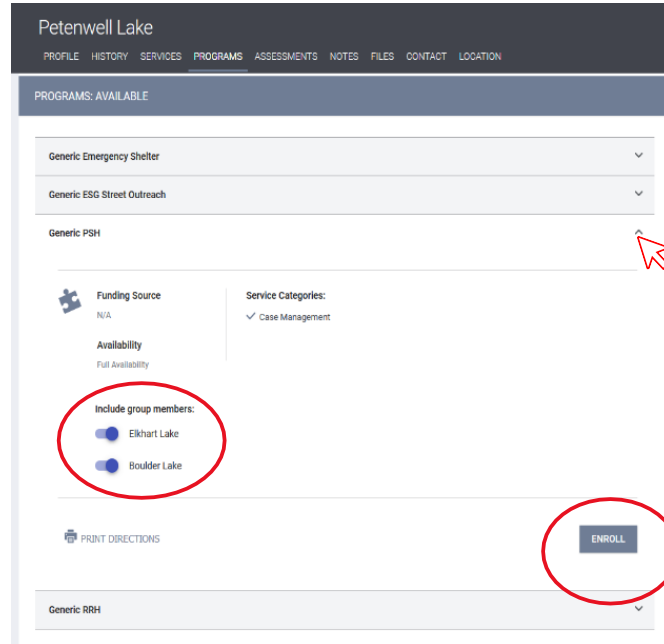
Petenwell Lake

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
--------------	------------	----------	------

3. Below the Program History section is the Programs Available list. This includes the active HMIS programs available at your Agency for client Enrollment.
4. To Enroll a client/household into a program select the small down arrow to the right of the desired Program.



5. Next, if applicable, toggle on the other Household members to include in a group enrollment. In the example above we are enrolling Petenwell, Elkhart, and Boulder into the Generic PSH program.
6. Click Enroll.

**Enrollment**

1. Clicking Enroll opens the Enroll Program pop up window where questions such as Program Start Date, Disability status, Income, etc. are answered. All fields on the Enrollment screen must be answered before clicking “Save & Next”

**Enroll Program for client Petenwell Lake**

Project Start Date

Relationship to Head of Household

In which county is the client being housed or service being provided?

**PRIOR LIVING SITUATION**

Type of Residence

Length of Stay in Prior

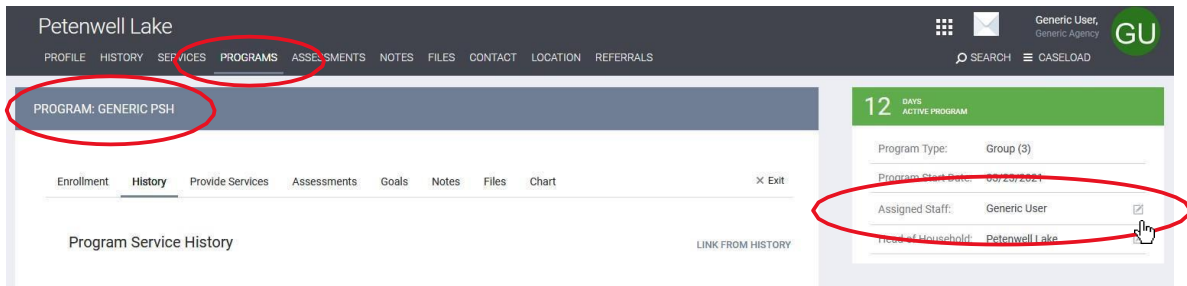
- a. If this is an Enrollment into Permanent Housing there will also be a question for the Move In Date. If this does not coincide with the Program Entry date this should be left blank and filled in once the housing move in date becomes known.

If there is more than one group member on the enrollment, you will be prompted to fill out the enrollment screen for the next household member once you have clicked Save and Next at the bottom of each household members enrollment screen

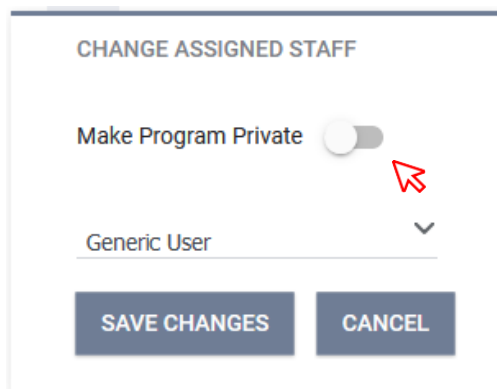
2. **Note:** There is conditional logic built into the Screen. You will only see the fields required for each household member. The fields required may adjust based on responses to previous fields.
  - a. For example, you will only see questions for the type of income if you select “Yes” for Monthly Income.

### **Making an Enrollment Private**

1. If a client chooses to limit their sharing but they already have a file in HMIS, you can choose to make the specific Enrollment itself private to your agency.
2. Navigate to the client’s relevant Program Enrollment. Under the green banner on the right-hand side there is table that includes the Assigned Staff. Click the Edit icon.



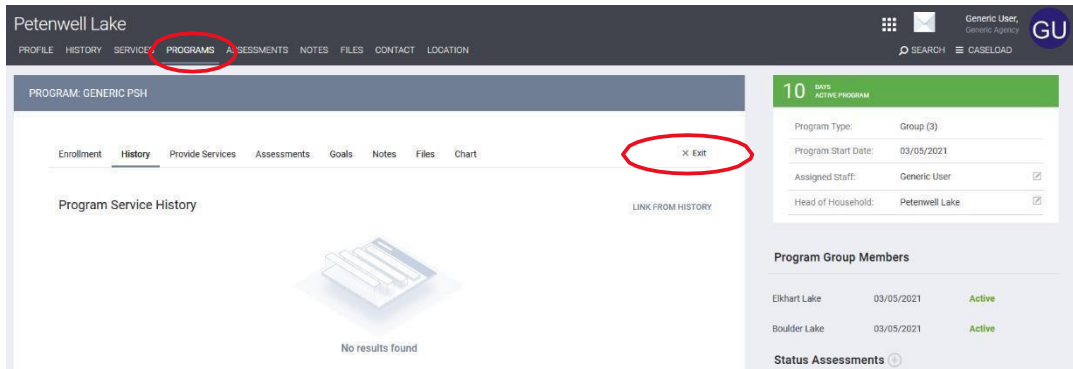
3. A small pop-up window will appear. From here you can update the assigned staff within an agency, but you may also choose to Make Program Private. Toggle it on and click Save Changes.



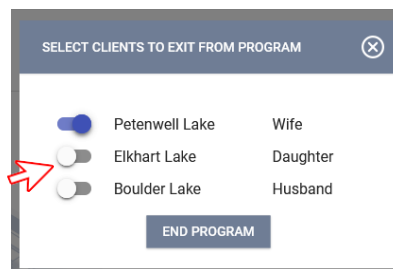
4. This will limit access to the Enrollment and associated records including program-level services, notes, files, forms, and assessments to users within an Agency.

## Ending a Program Enrollment

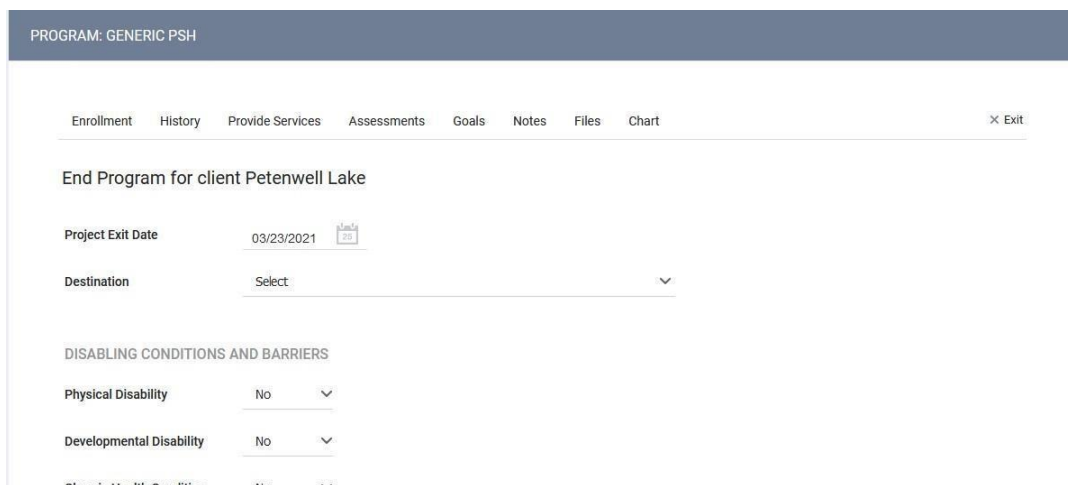
1. Click the Program tab.
2. The Exit button is located on the right side of the Program screen.



3. Clicking Exit opens a small pop-up window allowing you to select which group members are being exited.



4. Clicking End Program opens the Program's Exit Screen.



5. Enter any necessary updates to the screen fields and answer the Destination field.
  - a. If you are exiting more than one client, clicking Save and Next will bring you to the next household member's Exit Assessment.

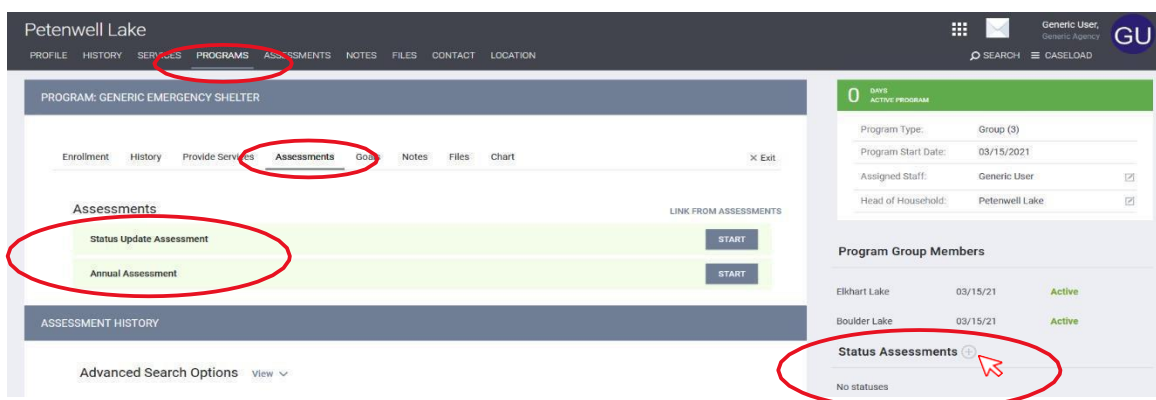
### **Additional Program Types**

Programs and Program types such as Night-by-Night Emergency Shelter, Coordinated Entry, Street Outreach, RHY, PATH, Veteran's programming, YHDP and, HOPWA have program specific workflows that may have steps or processes in addition to those outlined above.

## ASSESSMENTS

### **Status Updates (previously known as Interim Reviews)**

1. Status Assessments allow the user to document any changes to the client's record. Examples include change of income, updated disability status, updated Chronic Homelessness status, etc. Status Assessments are one of the options listed under a Program Enrollment's Assessments sub-tab. This can be accessed in two ways:
  - a. Clicking the Assessments Sub-tab under the Program tab.
  - b. Clicking on the plus sign next to the Status Assessments list on the right-hand side of the client's file.



- c. **Note:** the main Assessments tab allows viewing of all the Assessments associated with a client's file whereas the sub-tab Assessments is the preferred place to complete a new Assessments related to a specific Program. It is not possible to complete a Status Update and Annual Assessments on the main Assessments tab.

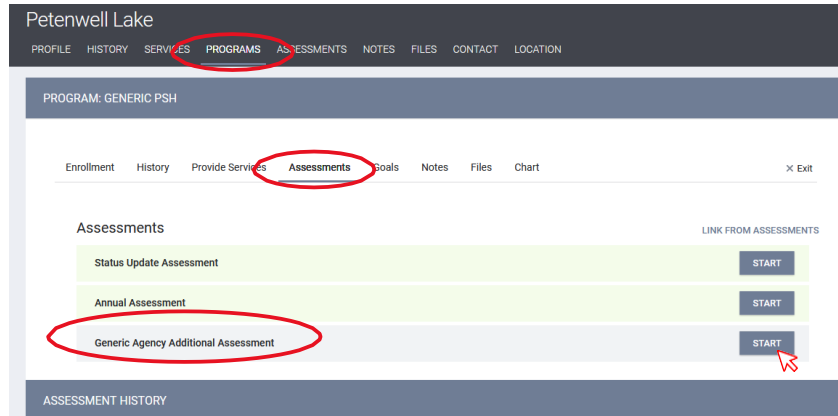
### **Annual Assessments (previously known as Annual Reviews)**

1. Annual Assessments are a specific type of Status Assessment that only apply to clients with a program enrollment of one-year or longer. These updates must be completed within a 60-day window centered on the anniversary of the HoH's start date.
  - a. **Note:** if household members joined the enrollment after the HoH, their Annual Review date will still be same as the HoH.
2. Annual Assessments are completed following the same steps listed above for Status Updates with the only difference being selecting the correct Assessment.Agency and Program Specific Assessments.



## Agency and Program Specific Assessments

Some Agencies and Programs use additional Assessments at program enrollment, throughout a client's enrollment, and/or as a follow up after a client exited. When available, any additional program Assessments are found under the Assessments sub-tab of the Programs tab.

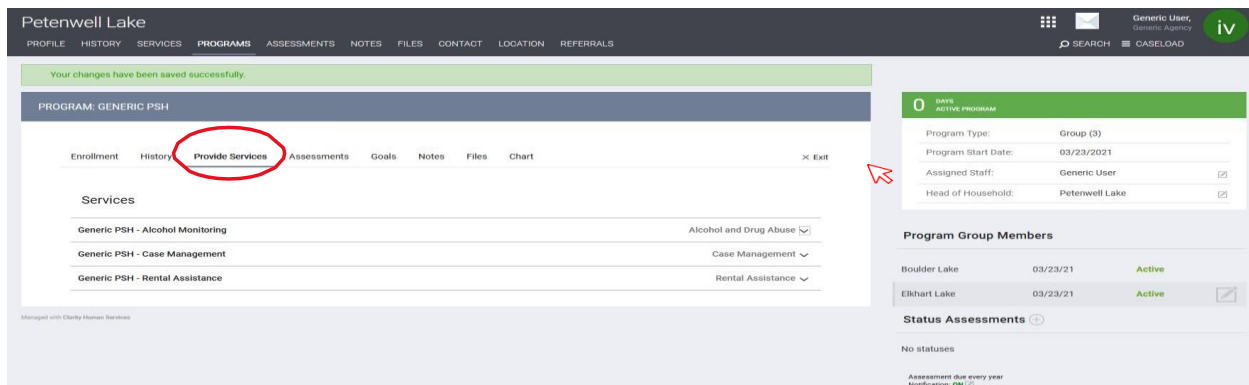


2. Clicking Start will open the Assessment. When it is complete be sure to click Save.
3. Once an Assessment is created it can be updated to make it Private by clicking Edit and toggling on the Private setting.
  - a. Note: Annual and Status Assessments cannot be set to Private in this way. They are tied to the Enrollment and will only be Private if the Enrollment itself is set as Private.

## PROVIDING SERVICES

### Documenting Services

1. Bitfocus does not use a standard service taxonomy and Services are customized at the agency and/or program level. For this reason, the available Services and their set-up will look different for each Agency.
  - i. Note: If agencies have questions about their Services set-up or the available options, please contact your System Administrator.
2. Once a Program Enrollment has been created you can access the available Services under the Provide Services sub- tab.



3. Services are grouped under broad categories, displayed on the right. In this example the Generic
4. PSH program has Services in three categories, Alcohol and Drug Abuse, Case Management, and Rental Assistance.
5. Clicking the small down arrow opens the service category. Depending on your Agency some Categories may have more than one Service Item as sub-categories.
6. Once you have navigated to the correct Service, clicking on it will open a window where the Service information may be entered. This includes the date, or dates, Service notes, and where relevant, the ability to document expense information.

Generic PSH - Rental Assistance

Rental Assistance

Event Date: 03/23/2021

Funding Source: Do Not Charge

Service Note

March 2021

1. Click Submit at the bottom of the screen to Save the record.
2. Once a Service has been entered it will populate in the client's History tab.

PROGRAM: GENERIC PSH

Enrollment **History** Provide Services Assessments Goals Notes Files Chart ✕ Exit

Program Service History LINK FROM HISTORY

Service Name	Start Date	End Date
Generic PSH - Rental Assistance:Rental Assistance Generic Agency	03/23/2021	03/23/2021

Reservation
  Service
  Referral

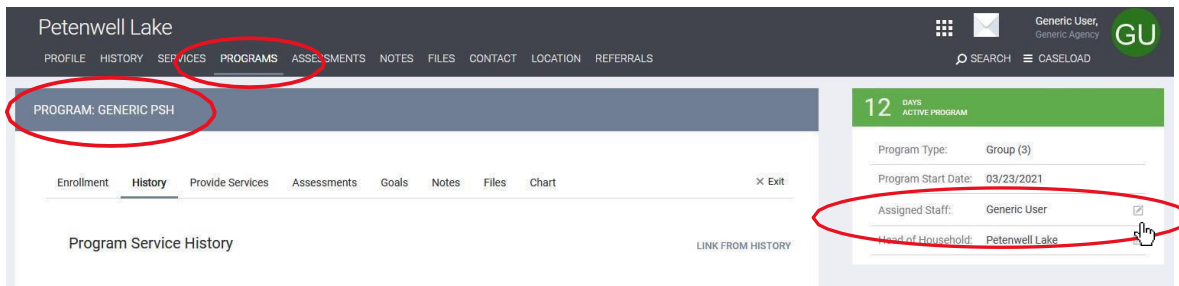
Note: A Service cannot be marked as Private.

**Assigning Staff**

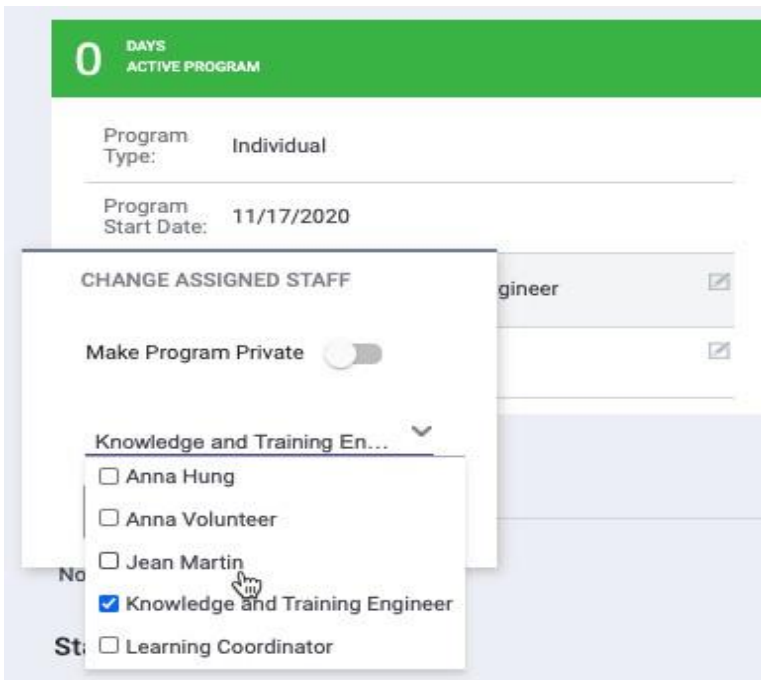
1. To add client(s) to your Active Caseload you must assign yourself as their case manager under the same section as **Making Program Private**.
  - i) These client will appear under the Caseload tab shown below on your landing page.



2. Navigate to the client’s relevant Program Enrollment. Under the green banner on the right-hand side there is table that includes the Assigned Staff. Click the Edit icon.



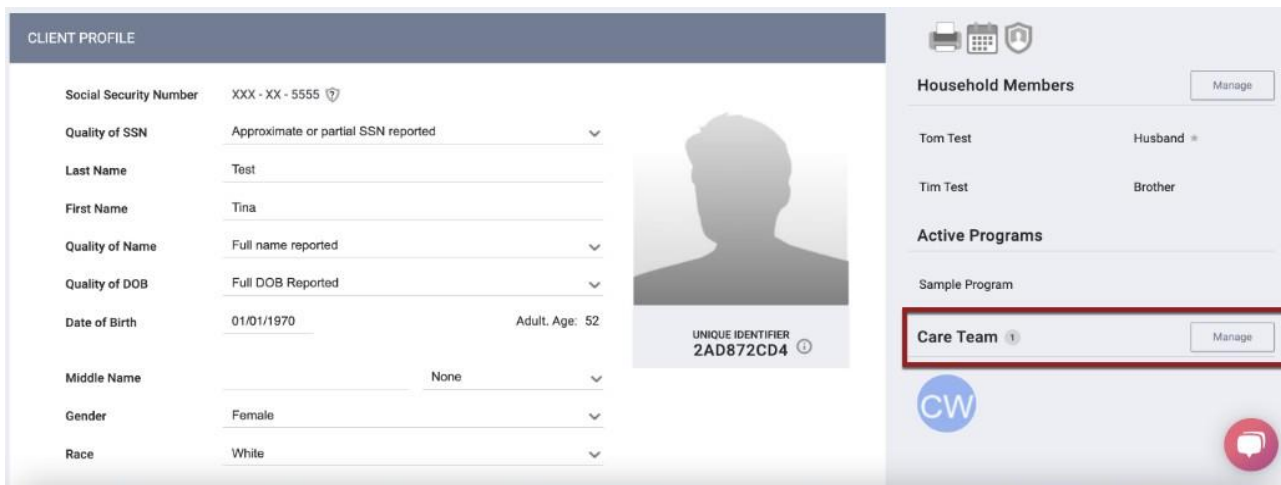
3. A small pop-up window will appear.



4. You can select multiple staff members by clicking the checkbox next to each name. You can also remove the staff member automatically assigned during enrollment.
5. From here you can update the assigned staff within an agency and click Save Changes.
6. This will limit access to the Enrollment and associated records including program-level services, notes, files, forms, and assessments to users within an Agency.

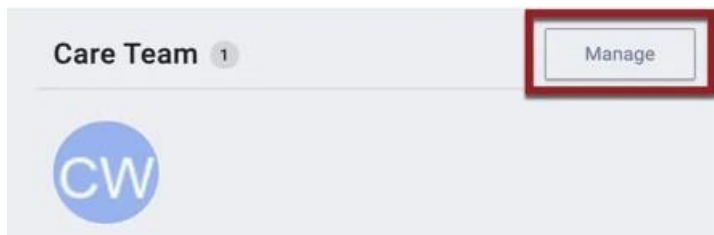
### Care Team Management

The client PROFILE in Clarity Human Services includes a **Care Team** section that includes all [Assigned Staff](#) from the client's active program enrollments, along with any staff members who are manually added to the team because they are involved with the client's care but aren't included in the Assigned Staff list.



### Manage the Care Team

Click *Manage* to access the CARE TEAM MANAGEMENT page.



The CARE TEAM MANAGEMENT page lists all **Active Care Team** members and **Inactive Care Team** members. Team members move from the Active list to the Inactive list when they have an End Date that is before today's date.

The listing for each Care Team member includes their name, agency, start date, and end date (if applicable).

Additionally, the Type column indicates whether they were added to the Care Team manually or through a program enrollment.

CARE TEAM MANAGEMENT		ADD CARE TEAM MEMBER (+)	
<b>Active Care Team</b>			
Care Team Member	Type	Start Date	End Date
Cassie Worker ABC Agency	Enrollment	04/21/2022	

### Add a New Care Team Member

To add a new *Care Team* member, click **ADD CARE TEAM MEMBER**.



The **ADD CARE TEAM MEMBER** pop-up appears.

ADD CARE TEAM MEMBER
✕

**User** Sam Staffer ▾

**Start Date** [ / / ] [ 25 ]

**End Date** [ / / ] [ 25 ]

**Public**

ADD
CANCEL

- In the **User** field, select the name of the staff member to add to the team from the drop-down list.
- Enter a **Start Date**.
- The **End Date** field is optional.
- The **Public** toggle is turned ON by default.
  - When the **Public** toggle is ON, the Care Team member will be visible to any user with access to view that client record.
  - Turn the **Public** toggle OFF if you want the Care Team member to be visible only to users at the same agency.



Click **ADD** to add the staff member to the Care Team.

### Delete/Edit a Care Team Member

To edit a staff member who was manually added to the Care Team, click the *Edit* icon next to their name.

CARE TEAM MANAGEMENT ADD CARE TEAM MEMBER +

#### Active Care Team

Care Team Member	Type	Start Date	End Date
Cassie Worker ABC Agency	Enrollment	04/21/2022	
  Sam Staffer ABC Agency	Manual	12/01/2022	

*Edit*

The EDIT CARE TEAM MEMBER pop-up appears. Edit the fields as needed, then click *UPDATE*.

EDIT CARE TEAM MEMBER ✕

User: Sam Staffer ▼

Start Date: 12/01/2022 📅

End Date: 📅

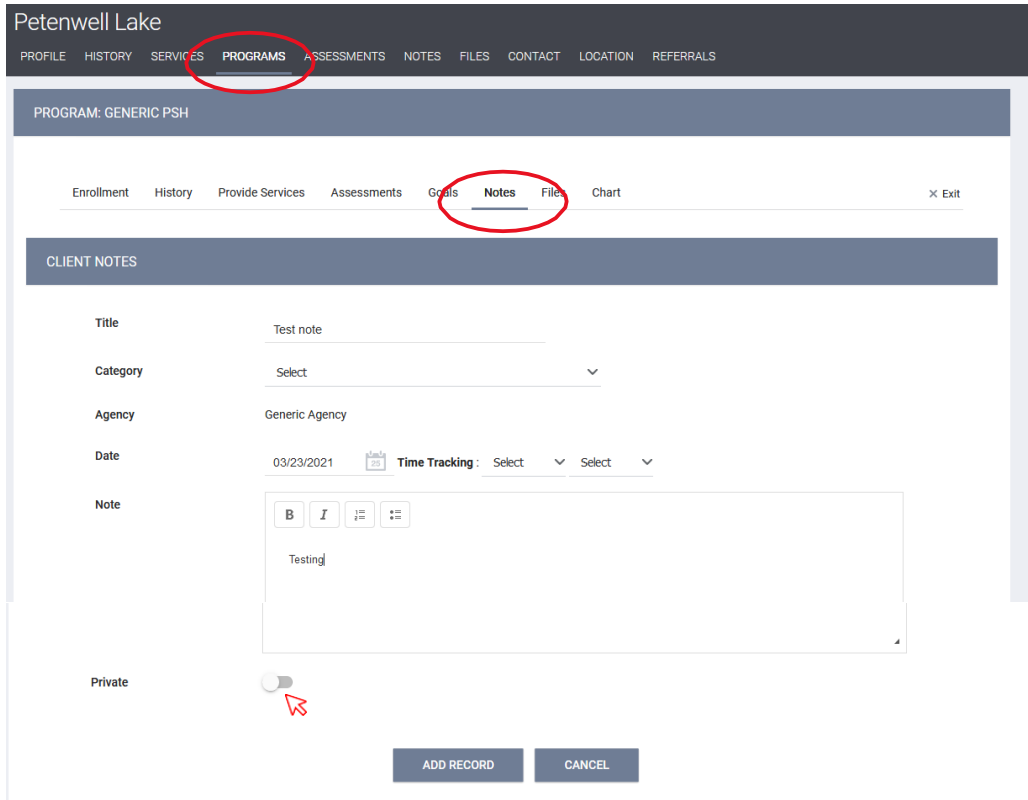
Public:

UPDATE CANCEL

To delete a manually-added Care Team member, click the trash can icon next to their name.

### Client Case Notes

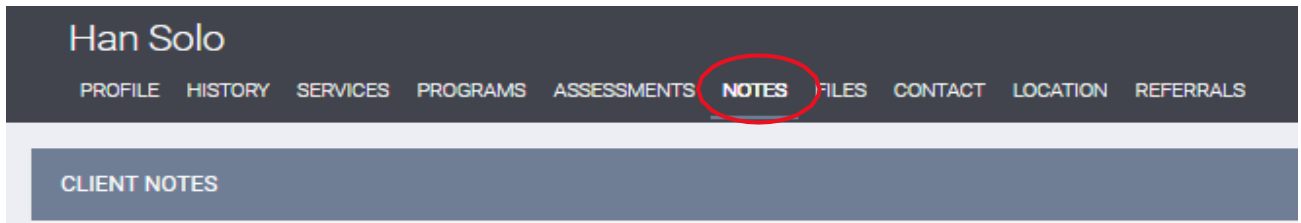
1. Most client Notes are associated with a specific Program and are entered within the Program Enrollment.



2. Case Notes are Private and only your Agency can see the note contents.

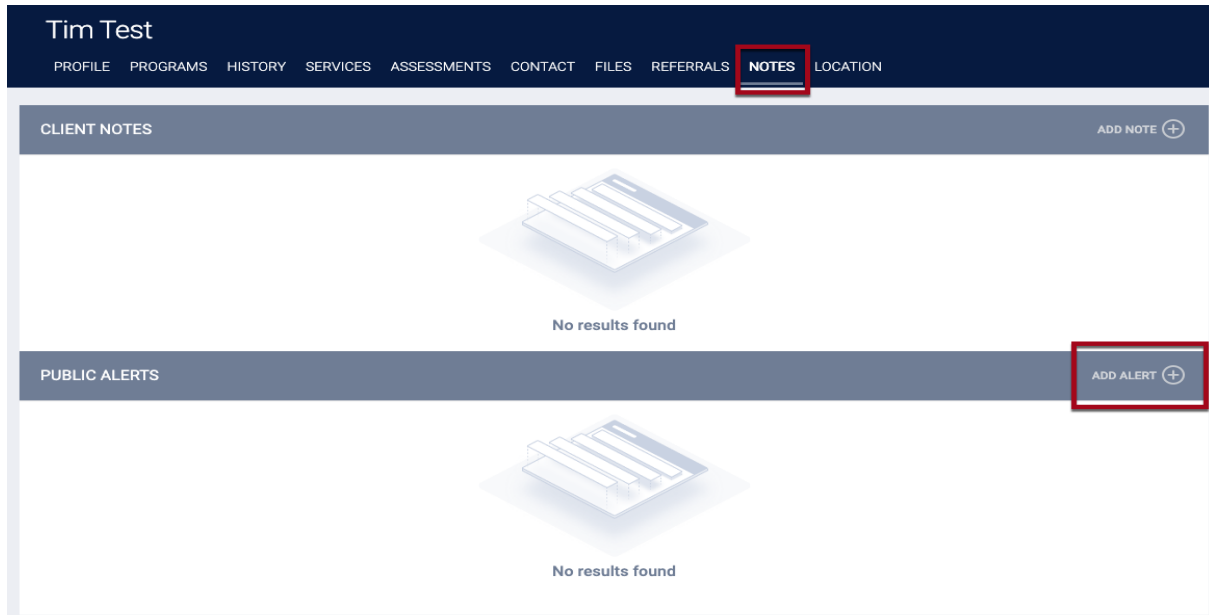
### Notes

1. The Notes located on the top banner are visible to the entire community.
2. These are Notes that Coordinated Entry staff will enter for clients.
3. Ensure that Notes entered here are meant to be seen across all sharing agencies.



## Public Alerts

To create a public alert, go to the NOTES tab in the client record and click **ADD ALERT**.



The PUBLIC ALERTS page appears.

A screenshot of the "PUBLIC ALERTS" form. The form has a dark header with the text "PUBLIC ALERTS". On the left side, there are labels for "Title", "Agency", "Expiration Date", "Note", and "Private". The "Agency" field is populated with "Clarity Human Services General Training Agency". The "Expiration Date" field has a date picker icon. The "Note" field is a large text area with a rich text editor toolbar containing icons for Bold (B), Italic (I), Underline (U), and Bulleted List (UL). The "Private" field has a toggle switch that is currently turned off. At the bottom of the form, there are two buttons: "SAVE CHANGES" and "CANCEL".

Enter a **Title**, **Expiration Date**, and text explaining the nature of the alert.  
**Note:** the **Agency** field will automatically populate with the name of your agency.



## Coordinated Entry Events

1. The Events tab in a client's program enrollment provides a history of Coordinated Entry Events (CE Events) for that enrollment and allows users to record Manual Coordinated Entry Events for the client.
2. The Coordinated Entry Events section of the Events tab displays a list of Manual CE Events that have been enabled and configured for the program.

The screenshot shows a software interface for a program titled "PROGRAM: CHARLOTTE-MECKLENBURG COORDINATED ENTRY". At the top, there is a navigation menu with tabs for "Enrollment", "History", "Provide Services", "Events", "Assessments", "Goals", "Notes", "Files", and "Forms". The "Events" tab is currently selected and underlined. Below the navigation menu, the section is titled "Coordinated Entry Events". A list of ten manual CE events is displayed, each separated by a horizontal line. The events are:

- Problem Solving/Diversion/Rapid Resolution intervention or service
- Referral to Street Outreach project or services
- Referral to Housing Navigation project or services
- Referral to Emergency Shelter bed opening
- Referral to Transitional Housing bed/unit opening
- Referral to Joint TH-RRH project/unit/resource opening
- Referral to RRH project resource opening
- Referral to PSH project resource opening
- Referral to Other PH project/unit/resource opening
- Referral to Emergency Housing Voucher (EHV)

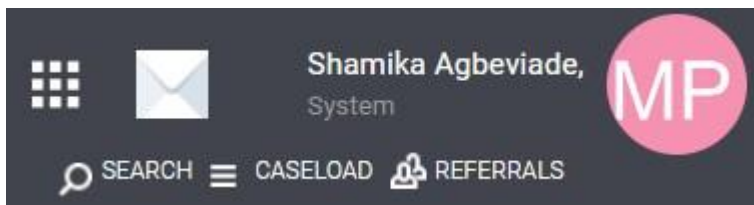
1. To record a Manual CE Event, click the down arrow next to the Event, complete the fields as appropriate, and click SUBMIT.
2. The record can be edited later in the CE Event History to update fields such as Referral Result.
3. Users can edit an Event by clicking its Edit icon on the HISTORY tab or in the HISTORY section of the Events tab of the associated enrollment.
4. Users can delete an Event by clicking its trash can icon.

## REFERRAL MANAGEMENT

### **Updating a Referral's Status**

Click on the Referrals tab located on the upper right corner of the screen. Please note that you must be in the Search Homepage in order to see the Referrals tab. To go to the Search Homepage, click on Search tab.

1. To update a referral's Status, click *REFERRALS*.



2. Locate the referral you would like to update and click the edit icon.

**REFERRALS**



Dashboard **Pending** Community Queue Analysis Completed Denied Sent Availability Open Units

**Pending Referrals**

Search  Mode Standard

Characteristic -- Select --  Sort By Default

Eligible Clients Only

Client	Referral Date	Qualified	Days Pending
 <b>Thumper Rabbit</b> Program: Demo 1-3 Referred by: System <input type="button" value="Edit"/>	12/13/2019	No	75 total 75 pending
 <b>Brown</b> Program: Demo 1-2	12/13/2019	No	75 total 75 pending

3. The REFERRAL: EDIT page appears.

**REFERRAL: EDIT**

**Client** Ted Flanders

**Referred Unit** A

**Referred Program** Sample Program

**Referred to Agency** Test Agency

**Referring Agency** [TRAINING] System

**Referred Date** 08/02/2021 10:45 AM

**Days Pending** 69 day(s)

**In Process** 0 day(s)

**Qualified** Reassigned

**Adult Priority score** 90

**Referred by Staff** Admin Admin

**Case Manager**

**Last Activity** 08/02/2021

**Status**

**Private**

4. Scroll down to the *Status* field.



**Updating from the Pending Tab**

A [pending](#) referral’s Status can be updated to “Pending - In Process,” “Denied,” or “Expired.” If you select “Denied” or “Expired,” the system displays additional fields.

Status	Denied	▼
Send to Community Queue	Yes	▼
Select Community Queue	Default	▼
Denied By Type	Provider	▼
Denied Reason	Client previously received service	▼
Denial Information	Received services last year.	

**Updating from the Sent Tab**

Suppose the client declines services or the referral was not appropriate. As long as the sent referral is not currently on a *Community Queue* or did not auto-generate a new referral to a queue, you can update the Status of the referral to move it from the [Sent tab](#) to the appropriate tab.



### Updating from the Denied Tab

If a referral was denied or expired in error, you can update the Status to move the referral from the Denied tab to the appropriate tab.

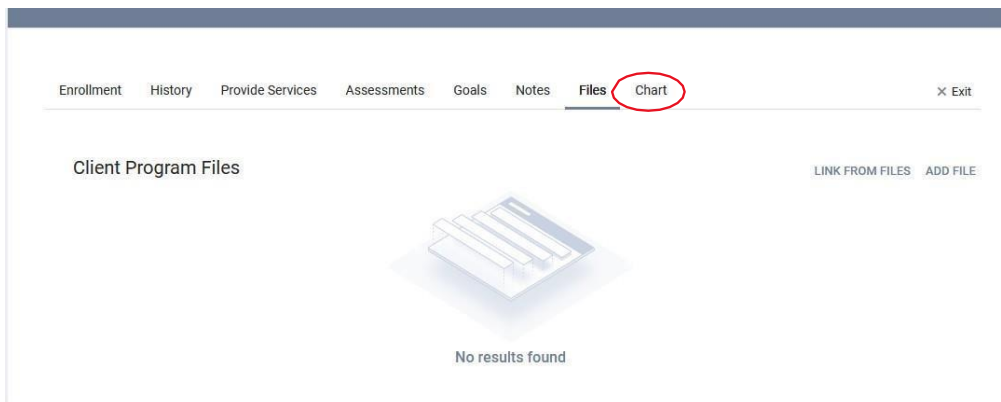
### Updating a Completed Referral's Status

You can only update a referral with a "Completed" status from the *Sent tab*.

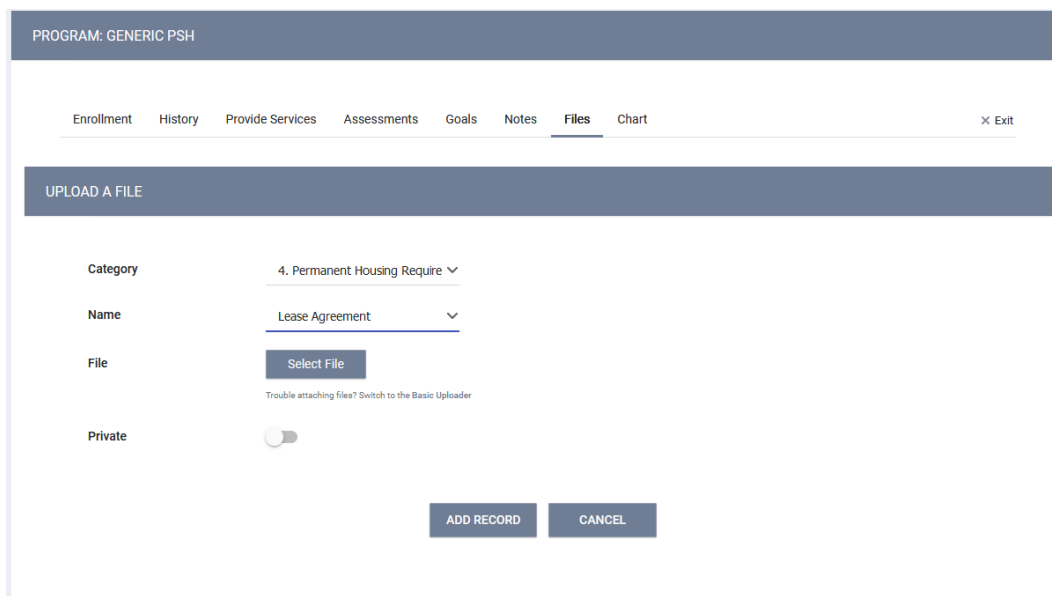
If a user deletes the enrollment connection from a referral in the *Completed tab*, the system automatically sets the referral status to "Pending."

## ATTACHING A FILE

1. Relevant program documentation can be attached under the Files tab.



2. Clicking Add File opens a window where the Category and Name are chosen from a picklist.
3. Clicking Select allows you to upload a file from your computer.



The screenshot shows a dialog box titled 'PROGRAM: GENERIC PSH' with a navigation bar containing tabs: Enrollment, History, Provide Services, Assessments, Goals, Notes, Files, and Chart. The 'Files' tab is selected. Below the navigation bar, there is a dark blue header with the text 'UPLOAD A FILE'. The form contains the following fields:

- Category:** A dropdown menu with the selected value '4. Permanent Housing Require'.
- Name:** A dropdown menu with the selected value 'Lease Agreement'.
- File:** A button labeled 'Select File'.
- Private:** A toggle switch that is currently turned off.

Below the form, there are two buttons: 'ADD RECORD' and 'CANCEL'. A small text link below the 'File' field reads: 'Trouble attaching files? Switch to the Basic Uploader'.

4. Selecting Private makes it so only users from your Agency can see that a File has been uploaded.
5. Users outside of your agency can view all files but cannot make edits.

## EXIT AND EXIT DESTINATION

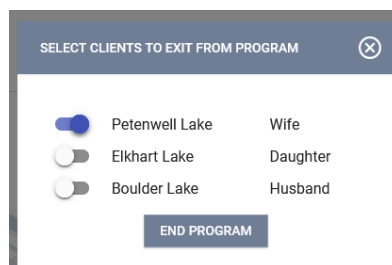
1. To exit a client from a program, go to the PROGRAMS tab from the client's record, hover over the program enrollment, and click the Edit icon.



2. From within the enrollment, click *Exit*.



- a. If there are additional household members, please ensure they are all toggled on to exit every member from the program.



- b. Identify where the client(s) will be staying after being exited from your program (that night). While other enrollment data will auto-populate (cascade) to the exit screen. The clients' Exit Destination must be entered at the time they are being exited from.

- c. Complete the exit screen and click *SAVE & NEXT* at the bottom of the screen to move to the next client's exit screen record. After you complete all the screens, the button will read *SAVE & EXIT*.

**Note:** If the Head of Household (HoH) leaves the project while other household members remain, you must designate another household member currently participating in the project as the new HoH (retroactively to the beginning of the household's enrollment).

## Living Situation Response Categories and Descriptions

Response	Description	Prior Living Situation (3.917)	Current Living Situation (4.12)	Destination (3.12)
<b>Homeless Situations (100-199)</b>				
	Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)	X	X	X
	Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter	X	X	X
	A facility, the primary purpose of which is to provide temporary shelter for individuals and families experiencing homelessness.			
Safe Haven	A form of supportive housing that serves hard-to-reach persons experiencing homelessness with severe mental illness and/or substance use disorders who are on the street and have been unable or unwilling to participate in supportive services.	X	X	X
<b>Institutional Situations (200-299)</b>				
	Foster care home or foster care group home	X	X	X
	Hospital or other residential non-psychiatric medical facility	X	X	X
	Jail, prison, or juvenile detention facility	X	X	X
	Long-term care facility or nursing home	X	X	X
	Psychiatric hospital or other psychiatric facility	X	X	X
	Substance abuse treatment facility or detox center	X	X	X

<b>Temporary Housing Situations (300-399)</b>				
Transitional housing for homeless persons (including homeless youth)		X	X	X
Residential project or halfway house with no homeless criteria	A sober living or other residential project with no lease or rights of tenancy, with or without time limits.	X	X	X
Hotel or motel paid for without emergency shelter voucher		X	X	X
Host Home (non-crisis)		X	X	X
Staying or living with friends, temporary tenure (e.g., room, apartment, or house)				X
Moved from one HOPWA funded project to HOPWA TH	Limited to use by HOPWA-funded projects			X
Staying or living in a friend's room, apartment, or house		X	X	
Staying or living in a family member's room, apartment, or house		X	X	
<b>Permanent Housing situation (400-499)</b>				
Staying or living with family, permanent tenure				X
Staying or living with friends, permanent tenure				X
Moved from one HOPWA funded project to HOPWA PH	Limited to use by HOPWA-funded projects			X
Rental by client, no ongoing housing subsidy	A rental that the client will pay for on their own (without a subsidy of any kind)	X	X	X
Rental by client, with ongoing housing subsidy	Any subsidized rental housing.	X	X	X
Owned by client, with ongoing housing subsidy		X	X	X
Owned by client, no ongoing housing subsidy		X	X	X



<b>Other (1-99)</b>				
No exit interview completed	This will be considered "missing data" for data quality and reporting purposes. This response should not be used in place of a valid Living Situation response			X
Other	Any response of "Other" in Destination will not count in any HMIS-based reporting as a positive outcome.		X	X
Deceased				X
Worker unable to determine			X	
Client doesn't know		X	X	X
Client prefers not to answer		X	X	X
Data not collected		X	X	X

**Subsidy Types – Dependent Field, relies on Living Situation = 435**

<b>Response</b>	<b>Description</b>
GPD TIP housing subsidy	
VASH housing subsidy	
RRH or equivalent subsidy	
HCV voucher (tenant or project based) (not dedicated)	Includes HCV with no paired services.
Public housing unit	
Rental by client, with other ongoing housing subsidy	
Housing Stability Voucher	
Family Unification Program Voucher (FUP)	
Foster Youth to Independence Initiative (FYI)	
Permanent Supportive Housing	
Other permanent housing dedicated for formerly homeless persons	