Clarity HMIS Workflow

Enrolling Clients in Clarity HMIS

1. If client is already in HMIS, make sure that their client profile is up-to-date.
2. If client is not in HMIS after searching for the client by their first name, last name, birth date or social security number, or any combination in the system, click on Add Client and enter the client's information.
3. If the Orange banner appears for you to manage client's consent to share – please click on Manage to make sure it's updated.
4. Enter client's contact info and emergency contact under the **Contact** tab.
5. If it's a family, please repeat steps 1-4 until all family members have been added.
6. Once all family members have been added, return to Head of Household's (HoH) profile to manage the household
7. Go to client's **Programs** tab.
8. Under Programs, click on the correct Program to enroll your client(s).
9. If enrolling the household members, toggle on household members under **Include group members** to include them in the enrollment and click **Enroll**.
10. **Project Start Date**- A project Start Date is required to indicate that a client was or being served by a project.
    Street Outreach: Date of first contact with the client.

    Emergency Shelter: Night the client first stayed in the shelter.

    Transitional Housing: Date the client moves into the residential project (i.e. first night in residence).

    Permanent Housing, including Rapid Re-Housing: Date following application that the client was admitted into the project. To be admitted indicates the following factors have been met: 1) Information provided by the client or from the referral indicates they meet the criteria for admission; 2) The client has indicated they want to be housed in this project; 3) The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, or scattered-site subsidy) or expects to have one in a reasonably short amount of time.

    Other Service Projects: including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment (April 2020), health care it is the date the client first began working with the project and generally received the first provision of service.
11. Complete Client Program Enrollment.
    Some data fields may already be completed due to cascade enrollment data feature set in Clarity; it allows information to pre-fill client's information based on previous enrollment values within a year. End users still need to make sure that the client's information is accurate and up to date.

Housing Move-in Date (All Permanent Housing Projects) Permanent Housing Project:
Remember to record **Housing Move-In Date** to which a client or household moves into a permanent housing unit.

To document the date that a household admitted into a Permanent Housing project moves into housing. This data is critical to point-in-time and housing inventory counts as it differentiates households which have already moved into permanent housing from households which are enrolled in a Permanent Housing project but are still literally homeless (in Emergency Shelter, Transitional Housing or on the street) as they prepare to move into an available unit.

For clients with a Project Start Date in a permanent housing project of any kind, record the date a client or household moves into a permanent housing unit.

Housing Move-in Date can only be entered in the Enrollment Screen.

Assessment: Current Living Situation (Street Outreach, DHHS MSC, MHA HAP/Drop in)
Record the date and location of each interaction with a client by recording their Current Living Situation. This element is designed to capture information about where a person is staying at a point in time and should be recorded for adults and heads of households.
The first Current Living Situation with the client will occur at the same point as Project Start Date (and recording of client's Prior Living Situation) and therefore requires a record to be opened in the HMIS for the client. Refer to guidance in HMIS Program Manuals (CoC, ESG, or VA) for more details.

If client's Current Living Situation is in a temporary, permanent, or other situation from the Living Situation Options List of headers, record additional housing status information to support the determination of imminent and at-risk of homelessness housing statuses based on HUD's definition of homelessness.

Street Outreach: All street outreach projects are expected to record every contact made with each client by recording their Current Living Situation, including when the Project Start Date, Prior Living Situation or Date of Engagement is recorded on the same day. There may or may not be a contact made at project exit.

Assessment: Program Status Update/Annual Assessment
Status Update Assessment: Conduct this assessment if client has any changes to disability types, income, benefits, or health insurance that occur while enrolled in the program.

Annual Status Assessment: Clients participating in a project one year or more requires an Annual Assessment. This assessment must be collected no more than 30 days before or after the anniversary of the head of household's Project Start Date; annual assessments are based solely on the head of household's anniversary date. All household members in the enrollment must have the annual assessment at the same time.

1. Go to **Programs** in the client profile and select the program you wish to add a status assessment by clicking the edit pencil icon.
2. In the client's program, click **Assessments.**
3. In Program Assessments you will see **Status Update Assessment** and **Annual Assessment**. Click **Start** on the appropriate assessment type (see definitions above).

4. Remember to toggle on (blue) any household members if any are included in the program and click **ADD STATUS ASSESSMENT**.
5. Add or edit any new changes that have occurred.
6. Complete all members of household then Click **Save & Close**.
7. All status updates or annual assessments completed are located below the **Assessment History.** If any information were incorrect at the time, you may edit the status updates by clicking the edit icon.

Project Exit

When a client is no longer considered to be participating in the project, the user must exit the client(s) from the program.

Residential projects: The last day of continuous stay in the project before the client transfers to another residential project or otherwise stops residing in the project.

Non-residential projects: the last day a service was provided or the last date of a period of ongoing service.

If a client uses a service for just <u>one day</u> (i.e., starts and stops before midnight of same day), then the Project Exit Date may be the same as the Project Start Date.

1. To exit a client and the household, go to the client's program.
2. Click on **x Exit**
3. Toggle on (blue) members of the household who are exiting from the program if needed.
4. Enter the **Project Exit Date.** Each household member may have separate exit dates, destinations, etc.
5. **Destination-** Select the response that most closely matches where your client will be staying after exiting your project.

HMIS Data Standards Manual: provides a review of all Universal Data Elements, Project Descriptor Data Elements, and Common Program Specific Data Elements. It contains information on data collection requirements, instructions for data collection, and descriptions that the HMIS User will find as a reference.

https://www.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf

Should you have any HMIS related questions feel free to submit a ticket.

Bitfocus Help Center: https://get.clarityhs.help/hc/en-us

City of Long Beach HMIS Page: http://www.longbeach.gov/health/services/directory/homeless-services/hmis/

Questions? Email LBHMIS@longbeach.gov