Homeless Management Information System (HMIS)

Training Manual

Updated 06/2025

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Contact

Kern Health Systems (KHS): HMIS Lead Agency

Office Location

For any in-person visits or mail correspondence, please refer to our physical office location:

Kern Health Systems
2900 Buck Owens Blvd
Bakersfield, CA 93308

Phone Contact

If you need to reach us by phone, please use the following number:

Telephone:
(661) 664-5000

Fax:
(661) 664-5151

Office Hours:

- **Monday to Friday:** 8:00 AM - 5:00 PM
- **Saturday and Sunday:** Closed

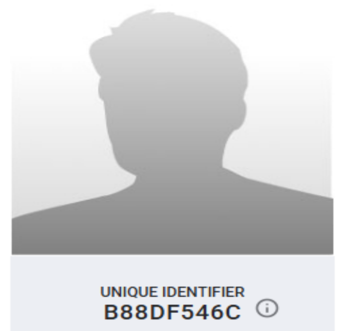
Website Access

For additional information, online resources, or to contact us via our web portal, please visit our official website:

Website:
www.kernfamilyhealthcare.com

Help Desk

If you encounter any issues with the Bitfocus Clarity Human Service System (HMIS) at any time, please contact the help desk using the email address below.



Please avoid sending any identifying information for clients when emailing the help desk. Each client record in the system has a unique client ID number, which can be found at the bottom of the client's picture on their profile. Use the client ID number when emailing the help desk, if applicable.

HMIS Helpdesk: hmissupport@kernhmis.com
HMIS Support: (661) 208-4647

Clarity HMIS Access

You can access HMIS with the following link:

https://kern.clarityhs.com/login

Need More Training?

For more information, please contact the HMIS Support:

HMIS Support: (661) 208-4647
HMIS Helpdesk: hmissupport@kernhmis.com

Other Useful Resources

HMIS Data Standards Manual:
HMIS Requirements - HUD Exchange

HUD- HMIS News & Announcements:
https://www.hudexchange.info/hmis

Clarity Human Services Help Center:
https://help.bitfocus.com/

HMIS: What it is and why we use it

To effectively address homelessness, a community must first understand the full scope of the issue, including the demographics of those affected, and identify what strategies are successful and where improvements are needed. Reliable data plays a crucial role, enabling communities to set clear goals and confidently track their progress by measuring outputs, outcomes, and impacts.

A Homeless Management Information System (HMIS) is a system implemented by local Continuum of Care (CoC) networks to meet the requirements outlined in the CoC Program interim rule 24 CFR 578. This locally managed data system is designed to collect and analyze information about individuals and families experiencing homelessness or at risk of homelessness, including their housing and service needs. HMIS is a vital tool due to its ability to integrate and eliminate duplicate data across various community projects. The aggregate data collected through HMIS helps communities better understand the size, characteristics, and needs of the homeless population at different levels project, system, local, state, and national.

The Annual Homeless Assessment Report (AHAR) is produced by HUD each year and provides Congress with in-depth data on homelessness in the U.S. This report would not be possible without the reliable, aggregated data provided by local communities through HMIS.

In 2010, the U.S. Interagency Council on Homelessness (USICH) officially recognized HMIS as the primary tool for measuring outcomes in its *Opening Doors: Federal Strategic Plan to Prevent and End Homelessness*. Since then, federal agencies supporting homeless services, including those under the McKinney-Vento Act, have collaborated with HUD to coordinate efforts and improve the measurement of homelessness nationwide.

About Our HMIS Software

In Bakersfield and Kern County, the Homeless Management Information System (HMIS) is powered by Clarity Human Services, a comprehensive information management system designed to manage client tracking, case management, service and referral coordination, and reporting. This secure platform enables multiple agencies and users to input client data continuously, while ensuring that the information remains protected.

The HMIS in Bakersfield and Kern County is overseen by Kern Health Systems (KHS), which serves as the HMIS lead for the Bakersfield-Kern Homeless Collaborative (BKRHC), also known as The Collaborative. This group includes the Continuum of Care for the County of Kern. KHS is an independent public agency that manages Kern Family Health Care (KFHC), a health plan serving over 400,000 members. As part of the two-plan model of Medi-Cal managed care, KHS provides both a local initiative and a commercial Medi-Cal managed care plan.

Who is Bitfocus?

Bitfocus is an IT consulting firm that specializes in custom software development, database management, report generation, technical assistance (TA), and more, particularly for HMIS projects.

Clarity Human Services Software

Clarity Human Services Software is a new database management system developed by Silver Spur Systems LLC, a separate company from Bitfocus, founded after the purchase of METSYS. Both Bitfocus and Silver Spur are owned by Robert Herdzik. Clarity operates as a cloud-based service, which means it can be accessed via a web browser—such as Internet Explorer, Firefox, Safari, or Chrome—without needing to download or install any software. Users can securely log in from any location with internet access to manage and track client data.

Benefits of Clarity Human Services

A. Benefits for individuals and families experiencing homelessness include:

- Reduced duplication of intakes and assessments
- Streamlined referrals to services
- Coordinated case management

B. Benefits for agency directors and program managers include:

- The ability to track client outcomes
- Coordination of services both within agencies and with external providers
- Simplified generation of financial and programmatic reports for funders, boards, and stakeholders
- Support in making informed decisions about program design

C. Benefits for public policymakers and advocates include:

- A clearer understanding of the scope and extent of homelessness
- Accurate, unduplicated counts of individuals experiencing homelessness
- Identification of service gaps
- Data to inform systems design and policy decisions
- Creation of a forum for addressing community-wide issues related to homelessness

Ongoing HMIS User Education & Communication

HMIS Open Office Hours: Kern Health Systems (KHS) holds monthly virtual office hours on the last Wednesday of each month to foster community building and enhance HMIS networking across the Continuum of Care (CoC). These sessions serve as a platform for open communication about the HMIS/Clarity System and provide guidance on effective use. The goal is to help KHS better understand and address the needs of service providers and front-line staff.

Additionally, KHS's HMIS team offers ongoing training and support for HMIS users via email and phone to ensure smooth operation and system proficiency. Remember, you drive the system!

Agencies Required to Participate in HMIS

The HMIS Federal Partners have collaborated to develop the HMIS Data Standards, ensuring alignment across various funding sources and programs. The U.S. Department of Housing and Urban Development (HUD) has worked with program staff from its federal partners to standardize the data elements required for each program and to determine how and when data should be collected. The federal partners and programs involved include:

- **U.S. Department of Housing and Urban Development (HUD)**
  - **Office of Special Needs Assistance Programs (SNAPS)**
    - Continuum of Care (CoC) Program
    - Emergency Solutions Grants (ESG) Program
    - Housing Opportunities for Persons with AIDS (HOPWA)
    - HUD-Veterans Affairs Supportive Housing (HUD/VASH)
- **U.S. Department of Health and Human Services (HHS)**
  - **Administration for Children and Families (ACYF)** – Family and Youth Service Bureau (FYSB)
    - Runaway and Homeless Youth (RHY)
  - **Substance Abuse and Mental Health Services Administration (SAMHSA)**

        - Projects for Assistance in Transition from Homelessness (PATH)
- **U.S. Department of Veterans Affairs (VA)**
    - Supportive Services for Veteran Families (SSVF) Program
    - VA Community Contract Safe Haven Program (HCHV/SH)*
    - Grant and Per Diem Program (GPD)*

(*Participation in HMIS is not required for some programs, except for SSVF. The federal partners recognize the importance of communities recording Project Descriptor Data Elements and Universal Data Elements to support the completion of the Housing Inventory Count (HIC) and Point-in-Time (PIT) Count.)

While participation in HMIS is mandatory for certain programs, many other agencies are strongly encouraged to use the system to gain a comprehensive view of homelessness, though they are not required to do so. These include agencies offering housing services (e.g., transitional housing, supportive housing, emergency shelters) and those providing auxiliary services (e.g., food shelves and outreach programs).

The HMIS system is a powerful tool that helps track individuals experiencing homelessness, as well as those at risk of losing their housing. As a result, all agencies involved in providing services related to homelessness are encouraged to use HMIS to better coordinate efforts and improve outcomes.

What data is collected?

Universal Data Elements

The HMIS Universal Data Elements are required to be collected by all projects participating in HMIS, regardless of funding source. These elements establish the baseline data collection requirements across all contributing projects. The Universal Data Elements help produce unduplicated estimates of the number of individuals experiencing homelessness, accessing services, and provide insight into their basic demographic characteristics and service usage patterns, such as shelter stays and homelessness over time.

The following are the Universal Data Elements:
- 3.1 Name
- 3.2 Social Security Number
- 3.3 Date of Birth
- 3.4 Race

- 3.5 Ethnicity
- 3.6 Gender
- 3.7 Veteran Status
- 3.8 Disabling Condition
- 3.10 Project Start Date
- 3.11 Project Exit Date
- 3.12 Destination
- 3.15 Relationship to Head of Household
- 3.16 Client Location
- 3.20 Housing Move-in Date
- 3.917 Prior Living Situation

Program Specific Data Elements

Program Specific Data Elements differ from the Universal Data Elements in that no single project must collect every element listed. The required elements depend on the reporting requirements set forth by each federal partner for their programs. A federal partner may require all fields or response categories for a particular data element, or it may specify only certain fields or categories for reporting. For further details on these elements, refer to the 2024 HMIS Data Standards.

The following Program Specific Data Elements are required by more than one federal partner:

- 4.2 Income and Sources
- 4.3 Non-Cash Benefits
- 4.4 Health Insurance
- 4.5 Physical Disability
- 4.6 Developmental Disability
- 4.7 Chronic Health Condition
- 4.8 HIV/AIDS
- 4.9 Mental Health Condition
- 4.10 substance use disorder
- 4.11 Domestic Violence
- 4.12 Current Living Situation
- 4.13 Date of Engagement
- 4.14 Bed-Night Date
- 4.19 Coordinated Entry Assessment
- 4.20 Coordinated Entry Event

Privacy & Security

Like any system that manages sensitive data about individuals, HMIS comes with potential risks to personal privacy. To mitigate these risks, data privacy and security have been prioritized throughout the development and implementation of the system. Stringent measures have been put in place to ensure that personal information is protected and kept confidential.

Furthermore, before using the HMIS system, both agencies and end-users within those agencies must sign User's Agreements. These agreements require individuals to commit to upholding rigorous data privacy standards. This process ensures that all users are fully aware of their responsibility to safeguard client information and adhere to security protocols.

HMIS Computer Requirements/Workstation Security

Account Security

Your account security extends beyond just your computer. It is crucial that any Personally Identifiable Information (PPI) collected and entered into the HMIS remains secure at all times.

- All HMIS users must submit a signed receipt of the HMIS User Agreement before gaining system access.
- Passwords are known only to the individual user and are not accessible by the HMIS Administrator Agency or Lead Agency.
- All activity within the system is tracked and subject to audit. As the user, you are solely responsible for any actions taken under your account. Do not share your login details.

Working from Home

- The agency's Privacy Policy should include a "work from home" policy if remote work is permitted. Security measures must align with those of a professional work environment.

- If working remotely and handling client data, plan and implement controls to restrict downloads. Ensure home computers' hard drives are securely cleaned after use.

<u>Application Security</u>

When using the HMIS system in Clarity, the following standards must be followed:

- Do not store or display user access information (e.g., username and password) in any publicly accessible location.
- You are not allowed to log into more than one workstation or network location simultaneously.

<u>Workstation Security</u>

Ensure that access to the HMIS system in Clarity remains secure at all times.

- Publicly accessible computers used for HMIS data entry must be attended to by staff at all times.
- When workstations are not in use or staff are absent, take necessary steps to secure the computers and prevent unauthorized access.
- Workstations should automatically activate a password-protected screensaver after a short period of inactivity.
- If staff will be away for an extended period, they should log off both the data entry system and the computer.
- Do not store or display user access information in any publicly accessible location.

HUD Workstation Security Standards

Lock Your Workstation	Always lock your workstation whenever you leave it unattended, regardless of how long you will be away.
Password-Protected Screensaver	Ensure that your workstation is set to activate a password-protected screensaver within 5 to 8 minutes of inactivity.
Log Off for Extended Periods	• If you will be away from your workstation for 30 minutes or more, log off of Clarity. • If you will be away for 4 hours or more, log off both Clarity and your computer.

Disposing of Confidential Client Information

<u>Printing and Disposal of Hard Copy Data</u>

- Hard copy data containing Personally Protected Information (PPI) must only be printed from the HMIS system at the physical agency or jurisdiction location(s) and on printers that are secured from public access.
- The agency or jurisdiction is responsible for properly disposing of documents containing PPI by shredding paper records.

<u>HMIS Technology Equipment Re-Use and Disposal</u>

All technology equipment with hard drives used in conjunction with HMIS will be managed according to the following guidelines:

- **Re-Assigned Equipment**
  All technology equipment (including computers, printers, copiers, and fax machines) previously used to access HMIS but no longer needed for that purpose will have their hard drives reformatted multiple times.

- **Non-Functional Equipment**
  For non-functional technology equipment (including computers, printers, copiers, and fax machines) that was used to access HMIS, the hard drives must be removed, destroyed, and disposed of securely.
- **Leased Equipment**
  When leasing technology equipment, the lease agreement must include provisions for either the leasing company or the agency to (1) reformat the hard drive multiple times, or (2) destroy the hard drive.

Client Consent and Notification

Important Steps to Follow When Collecting Data from Clients

- Clients must be provided with a notification form that explains the HMIS system and the reasons for collecting their personal information.
- Clients must also be given a consent form, which they are required to sign and agree to.

Consumer Notice

- The "HMIS Consumer's Notice" must be posted and clearly visible to clients at every location where HMIS intake is being conducted.
- All outreach workers and case managers conducting HMIS intake off-site must carry the "Consumer's Notice" and ensure it is visibly posted at the intake station.
- Be sure to review the notice with clients to ensure they understand the key points.

Written Informed Consent

At entry into the program, the agency will provide a verbal explanation of both the HMIS system and the terms of consent. The client will complete, sign, and date the HMIS "Consumer's Informed Consent & Release of Information Authorization." The agency will not disclose confidential information without informed client consent. Clients cannot be denied services they would otherwise qualify for based on a refusal to share information.

- **3.917.1** Never add a new client to Clarity until you have reviewed the "Consumer Consent Form."

- **3.917.2** Do not start entering client data until you have reviewed the intake forms to ensure that all questions have been answered.
- **3.917.3** Return incomplete intake forms to the case manager or data collector for completion before entering them into the system.

Starting on Clarity

Web Browsers Supported by Clarity

- **3.917.3.1** Microsoft – Internet Explorer 9
- **3.917.3.2** Mozilla – Firefox 10
- **3.917.3.3** Google – Chrome 17
- **3.917.3.4** Apple – Safari 5.1.3

HUD Mandated Password Guidelines

Clarity enforces HUD's password guidelines to ensure security:

- The password must be at least 8 characters in length.
- It must contain an upper-case letter (e.g., H).
- It must contain a lower-case letter (e.g., h).
- It must contain a number (e.g., 9).
- It must contain a symbol (e.g., $).

Passwords CANNOT:

- Use or include the username.
- Include the HMIS name.
- Include the HMIS vendor's name (Bitfocus/Clarity).
- Consist entirely of any word found in the common dictionary or any of the above spelled backward.
- Contain any common word.

Password Expiration

Your password will expire every 90 days. You will receive a reminder email 10 days prior to expiration. When your password has expired, a prompt window will appear when you attempt to log in to Clarity. You will need to choose a new password and enter it in the prompt window. Reusing your current password will not be allowed.

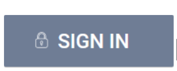
Browsers and Passwords

Never: allow your internet browser to store your login or password. Your browser may prompt you with the option to store your login or password on "this computer." Never use this option, as it could allow anyone using your workstation to access your account through the browser. Always ensure that your computer does not store your login or password.

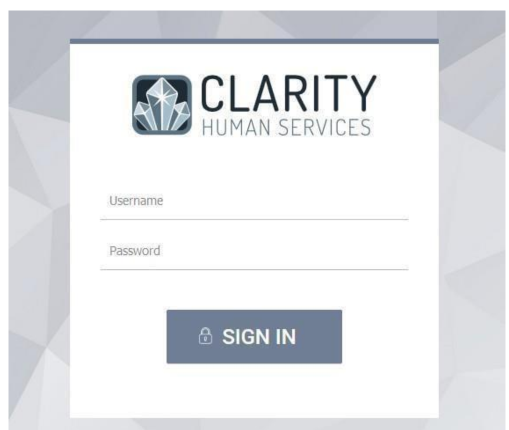
HMIS Login Expiration

Your login will expire every 30 days. You will receive a reminder email 10 days prior to expiration. If you allow your login to expire, you will receive an email notifying you of the expiration. To reactivate your login, you must send an email to hmissupport@kernhmis.com.

Log in Clarity

- Open your web browser (e.g., Chrome, Firefox, Internet Explorer, etc.).
- Turn **off any pop-up blockers** to ensure proper site functionality.
- Go to the website: https://kern.clarityhs.com/
- Enter your assigned **username** in the Username field.
- Enter your assigned **password** in the Password field.
- Click on the 

button to access your account.

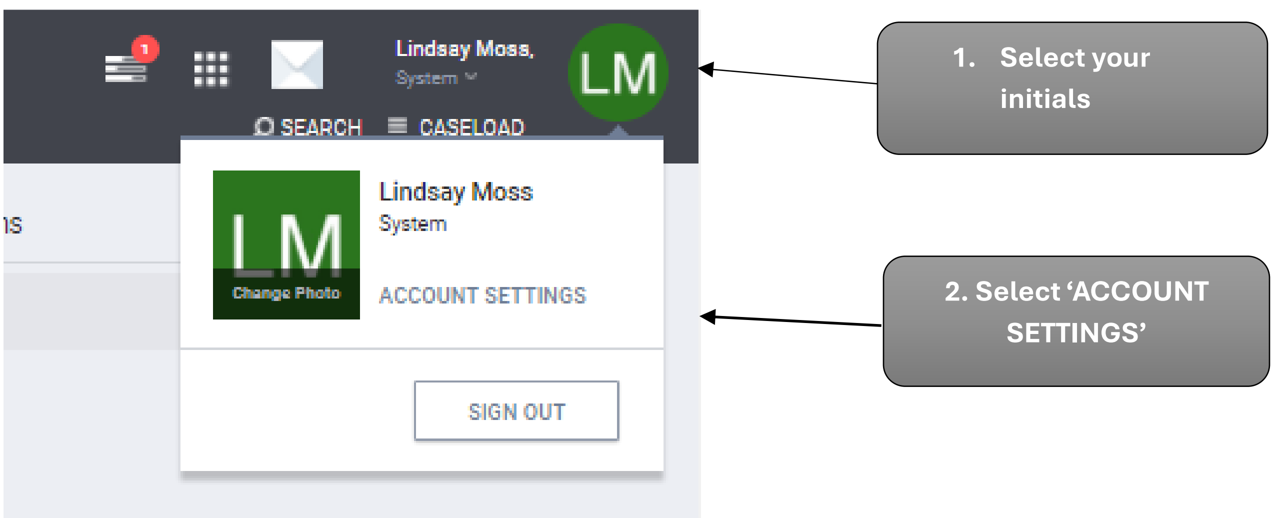


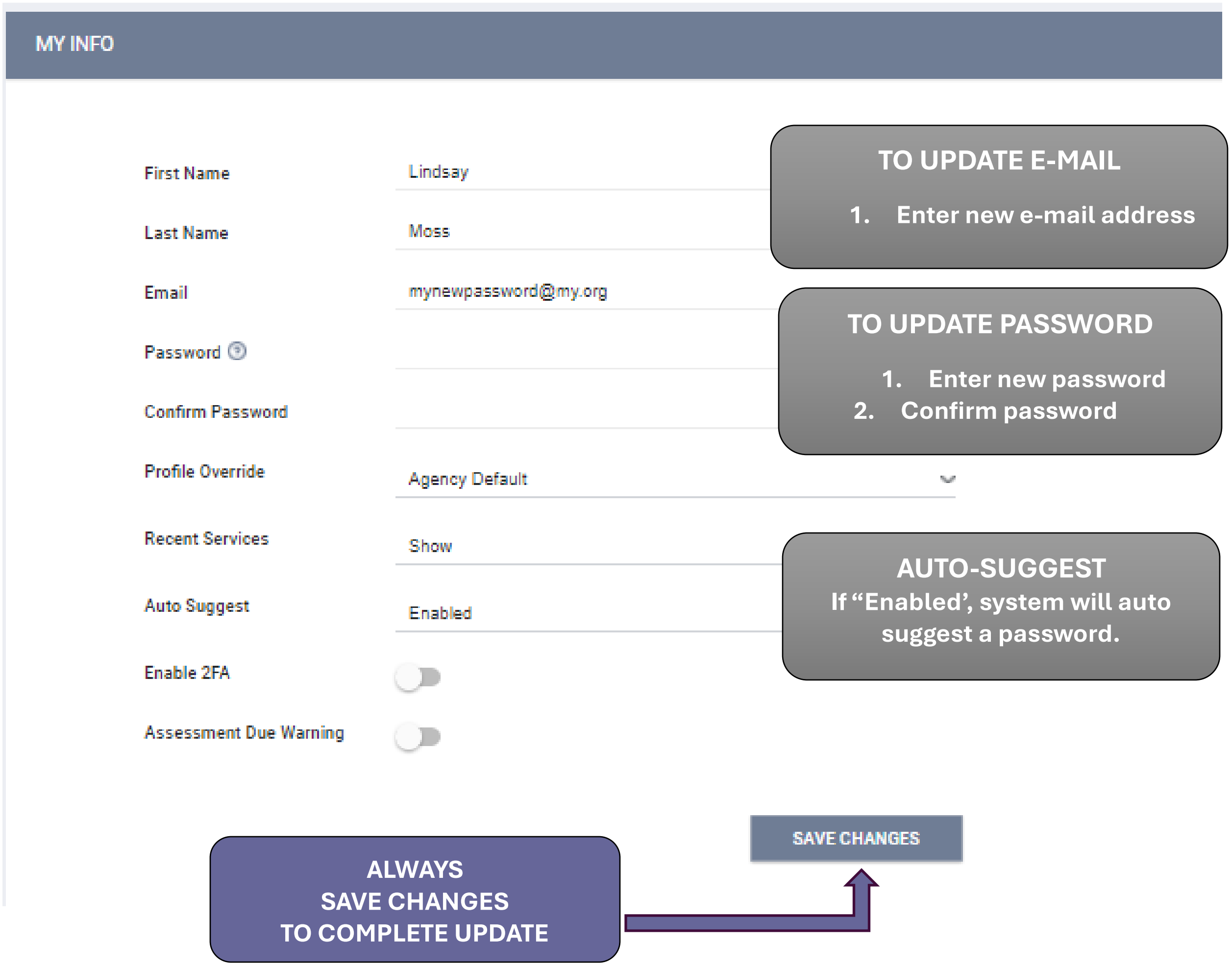
Account Lockout Warning:
If you attempt to log in five (5) consecutive times with an incorrect password, your account will be automatically deactivated**.** To reactivate your account, please contact HMIS Support**.**

Note: The first time you log in, you will be prompted to choose and confirm a new password. Select a new password that follows the guidelines provided on the previous page of this manual. When you have entered and confirmed your new password, click on the 

button to complete the process.

Updating Password and E-mail Address



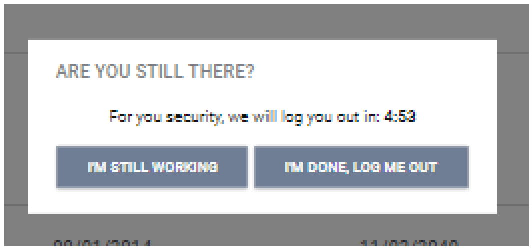


Automatic Log Off

Inactivity Timeout Notice:

If you are logged into Clarity but remain inactive for 60 minutes, the system will issue a 5-minute warning before automatically logging you out.

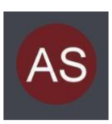
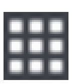
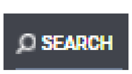
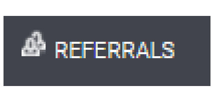
A message similar to the following will appear:

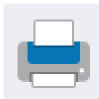
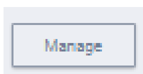
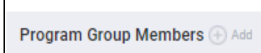
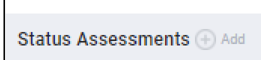
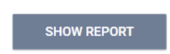


NOTE: If you are automatically logged off by Clarity due to inactivity, the last page you accessed will remain visible on screen. However, you will not be able to perform any actions until you log in again. Always ensure you log out manually when finished, especially on shared or public computers, to protect client confidentiality.

Common Clarity Icons

Clarity uses a variety of icons to help you navigate the system and complete tasks efficiently. The table below lists the most common icons you will encounter, along with their meanings and functions.

Icon	Name	Description / Actions
	**HMIS User's Initials**	Edit your **profile**, change your **password**, **update e-mail address**, or **sign out.**
	**Launchpad**	Located in upper-right hand corner of site, menu for Manage, Reports, Calendar, etc. options.
	**Client Search**	**Search** for a client. It will also bring up the **Referrals tab.**
	**Add New Record**	Add a **new client** into the database.
	**Referrals Tab**	Access your agency's referrals.

	**Client-based Reports**	Opens client-based reports that can only be accessed from the profile screen.
	**Edit**	Edit the record. Often appears when hovering the mouse cursor of a specific area.
	**Delete**	Delete a record. You will not be able to delete any enrollment/program history/ service. Program Enrollment/History can only be deleted by the Lead Agency's HMIS Staff.
	**Manage Household**	Add, Join, and Exit household members from Client sidebar.
	**Enroll Group Members**	Click on ⊕ next to 'Program Group Members' view on Programs screen sidebar to Enroll Program group.
	**Add Status Update**	Click on ⊕ next to 'Status Assessments' from within a specific program to Add/Update client's program status at appropriate interval.
	Choose Date	Choose a date using the calendar tool.
	**Clear Date**	Click on Icon to RUN reports.
	**Report Format**	Select the Report format before clicking  Note: Some "Web" reports allow you to drill down to see client list.

Searching for a Client

Reduce Duplications in HMIS

Agencies must take proactive steps to minimize duplicate client records by thoroughly searching for existing client profiles in HMIS before creating a new one. Duplicating records for a single client leads to confusion and inaccuracies.

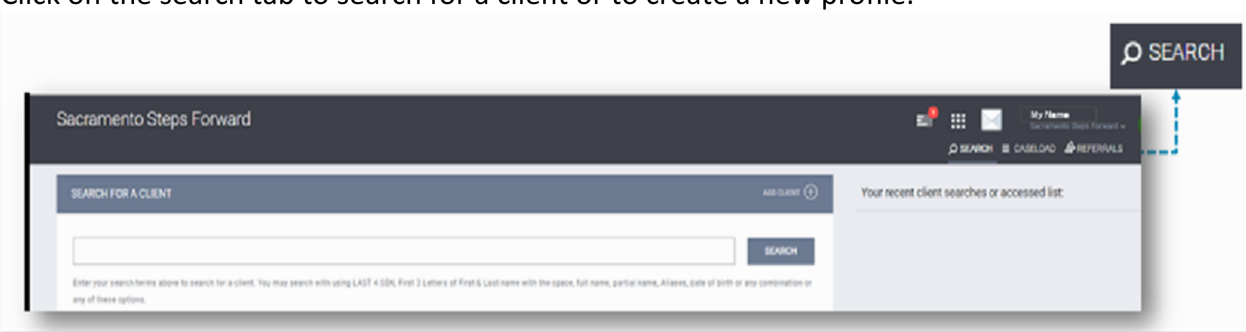
It is important to remember that if another provider has already entered a client into the system, the client's name may be spelled differently, or other details may have been entered incorrectly.

DO NOT SEARCH FULL NAMES – LESS IS MORE!

Using fewer letters in your search will yield the most possible matches.
This approach helps prevent creating duplicate client records due to misspellings or variations in names.
Keep searches simple and efficient!

Search for Clients from the Search option (top right-hand corner)

Click on the search tab to search for a client or to create a new profile.



Search Criteria

Before entering a NEW client, you must search to ensure that the client does not already exist in the database. To search for a client in Clarity, complete these **separate** searches in the order listed below:

Example Client Info:

- **First Name:** Training
- **Last Name:** 2020
- **SSN:** XXX-XX-4321

Search for the client using the following priority (in order of accuracy):

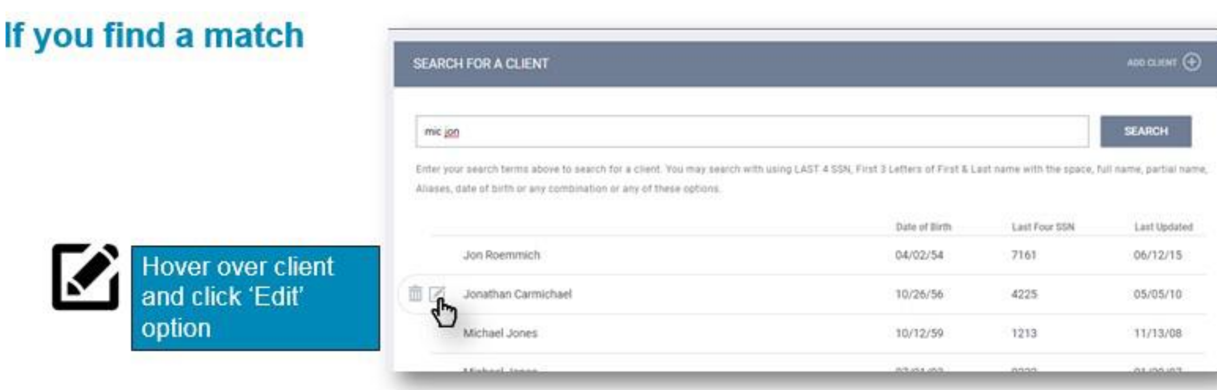
1. **Last 4 digits of SSN:** 4321
2. **First 3 letters of first name + first 3 letters of last name:** Tra202
3. **Combination of method 2 and SSN last 4:** Tra2024321

If a match is found:

- Hover over the client's name
- Click the **'Edit'** option to proceed

<u>Editing or Adding Clients</u>

Editing a client found in Search



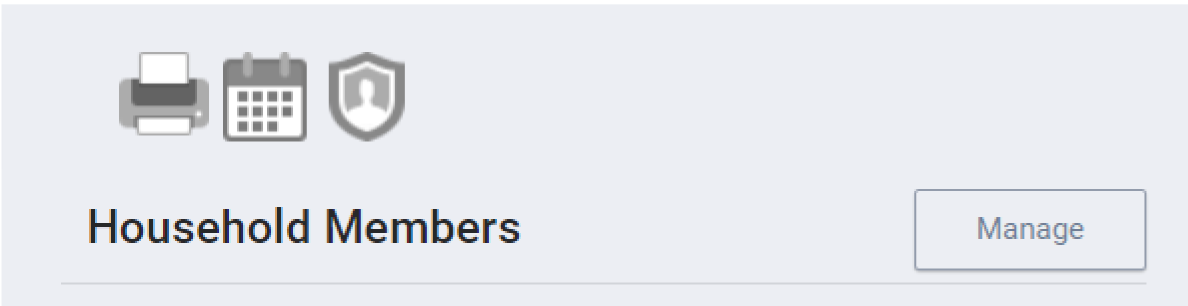
Update the profile screen with current information. ***Note*** If a client has changed their last name, update the record and include the previous last name on the "Alias" line. In the "Notes" tab, indicate the old last name and the documentation you saw to validate the name change (DL, SSC, etc.)

If a Release of Information (ROI) is Missing

If Clarity cannot determine an ROI for the client, a yellow banner will appear on the profile page to alert you.

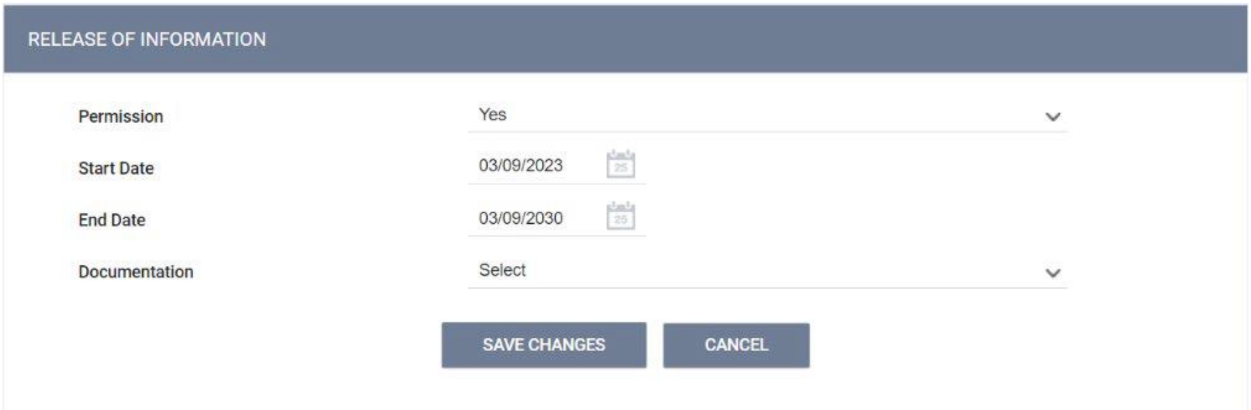
How to add ROI

1. Select the security shield in the upper right-hand corner.



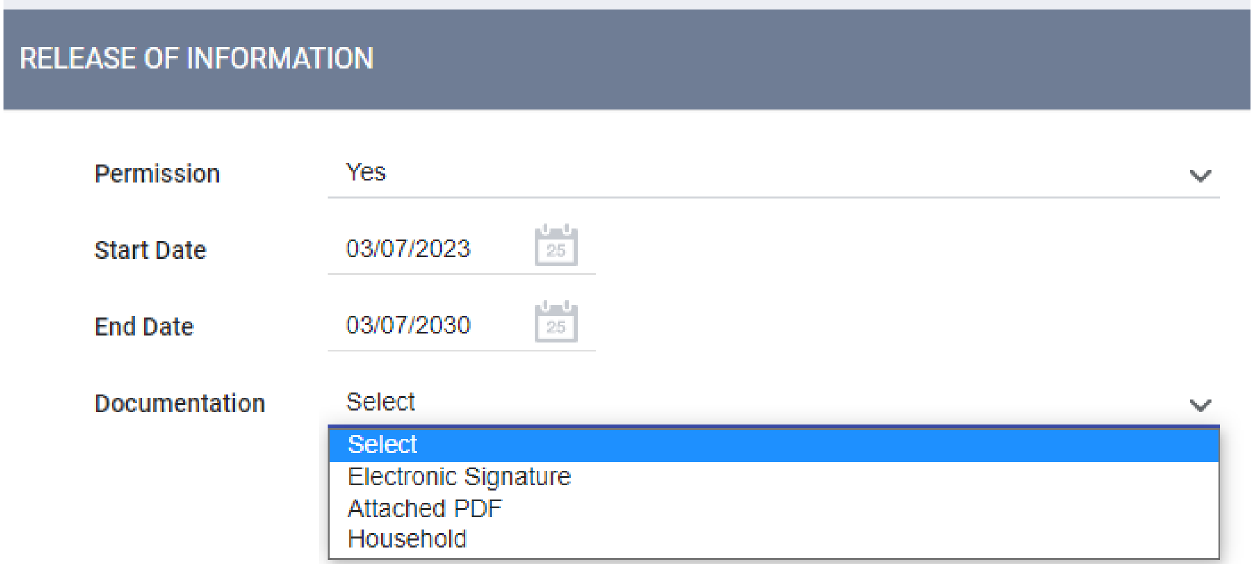
2. Select ‘Add Release of Information’ on ‘Release of Information’ bar.

3. Add in the permission status, date range, and documentation of the ROI.
You can affirm approval by:
• Allowing your client to sign electronically
• Uploading a PDF
• Household — Indicating proxy consent via a group/family member



<u>Changes to the ROI Categories</u>

The image below shows what will appear when adding a new HMIS ROI. You'll notice that two previous options—Verbal Consent and Signed Paper Document, are no longer available, as both have been retired



1. Signed Paper Document

The "Signed Paper Document" ROI option—used to indicate that your agency had a physical copy of the client's signed ROI on file.
If you have active clients with a Signed Paper Document ROI placed by your agency, please follow these steps:

- Scan the original signed document.
- Edit the existing ROI entry and change the type to Attached PDF ROI.

- Upload the scanned document to the updated ROI record.

Important: The ROI date must match the date the client originally signed the document.
If your agency did not place the original ROI or if the document cannot be located, you must obtain a new, valid ROI from the client as soon as possible and upload it to their file.
As a reminder, all documents uploaded to HMIS must be legible and professionally presented.

Adding a New Client

If you are unable to find the client, you may add a new client from the client search screen, using the add client function.

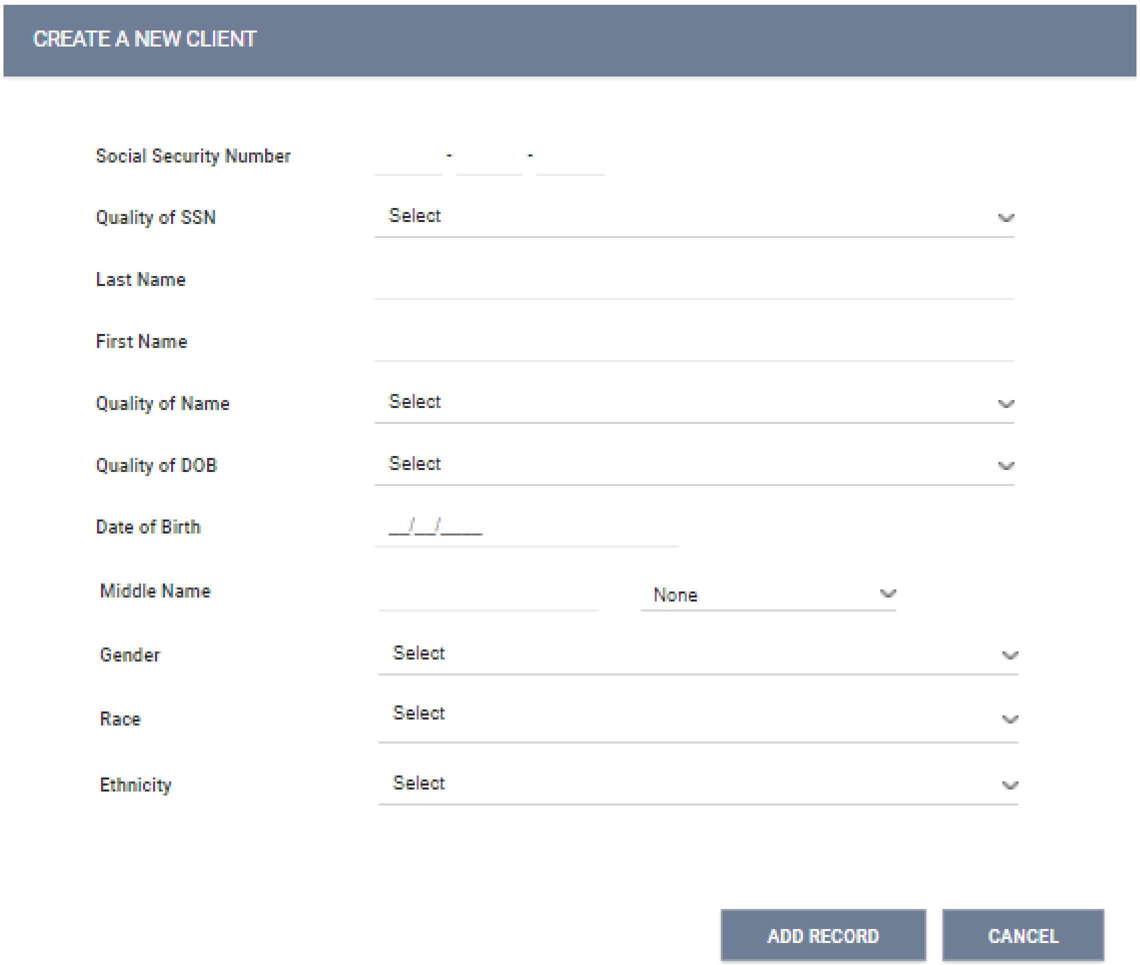
Completing the Intake Screen

- Complete all fields on the Intake screen with accurate information.
- Once finished, click “Add Record” at the bottom of the page to save the file.
- All fields are required and must be filled in completely.

Important Notes:

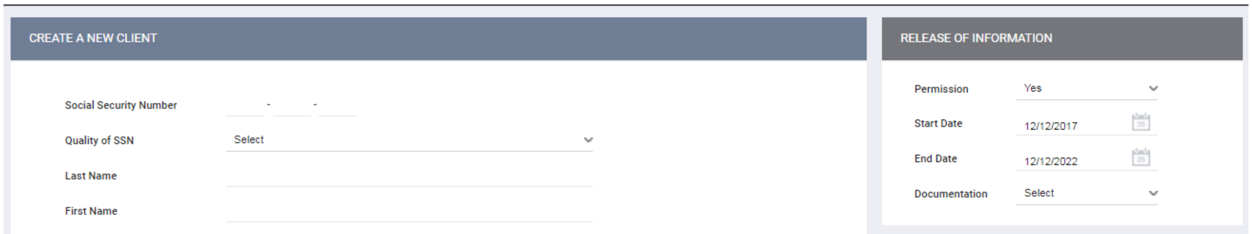
- If any HUD Universal Data Elements (UDEs) are missing, the system will prevent you from saving the file.
    - Missing required fields will be highlighted in red for your attention.
- If the Zip Code of Last Address is incomplete:
    - You may estimate the zip code and complete the remainder with zeros (e.g., use 93301 for Bakersfield/Kern).

After addressing all missing fields, click “Add Record” again to successfully create the file.



Please review your intake to ensure accuracy and completeness.

Add the Release of Information from the dialogue on the upper-right hand side of the 'Create a New Client' screen **(required!):**



Client Consent and Data Entry Guidelines

If the Client Does Not Consent:

- Select Permission: No.
- Create an anonymous profile that excludes any personally identifying information (e.g., name, date of birth, Social Security Number).
- You may still enter non-identifying demographic data such as:
  - Race
  - Ethnicity
  - Veteran status (if appropriate)
    These data points help in service planning and do not compromise client anonymity.

If the Client Consents:

Consent can be documented using one of the following methods:

- Electronic signature
- Uploading a signed PDF
- Proxy consent (e.g., given by a group or family member, when appropriate)

Using Valid Response Categories

Most HUD data fields allow for the following response options:

- Client doesn’t know
- Client refused

These are valid responses and should be used **only** when:

- The client genuinely does not know the information, **or**
- The client explicitly refuses to answer

Clients must not be denied services for refusing to provide certain information.

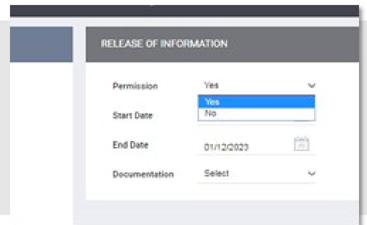
Do Not Substitute Staff Assumptions

- If the case manager or data entry staff does not know the client’s response, do not select "Client doesn’t know" or "Client refused."

- Instead, select “Data not collected”.

This response will be treated as missing data for reporting purposes.

1. Add your client from SEARCH >> ADD CLIENT
2. Set the ‘Release of Information’ Permission to ‘No’



3. Enter the following anonymous info:

SSN	000-00-0000
Quality of SSN	Client Refused
Quality of DOB	Approximate
DOB	Jan 1 actual year of birth +/- 1 year*
Gender, race, ethnicity, veteran status	*Actual is OK, so long as it’s not a give-away*
First name	*Your agency’s internal ID if you have one, or* Consent
Last name	Refused

(Households and Families ONLY-SKIP for Individuals)

When adults or unaccompanied minors are seeking services together, they can be entered as a household in Clarity. People do not need to be married to be entered as a household—for example, an adult, sibling, and grandmother seeking services together would be considered a household.

A parent seeking services with their children should always be entered as a household.

These are two key situations where clients should be grouped as a household. To ensure they are counted as “Family Members” in the HUD Annual Performance Report (APR), clients must be entered into a household **before** enrolling in a program.

Types of households

Head of Household:
Data collection is required only for the head of household. The term "head of household" is used for consistency with federal guidance and does not necessarily reflect the individual's role within the family or group. CoCs and HMIS Lead Agencies may choose to define "head of household" differently for their jurisdictions or use an alternative term such as "primary client."

Head of Household and Adults:
Data must be collected for the head of household and each additional adult in the household. If the household consists of an unaccompanied minor, that child is considered the head of household. In households made up entirely of minors, data should be collected for the child designated as the head of household.

When individuals apply for services together as a household or family, the head of household may provide information for any children under 18. These children do not need to be present during intake. However, if the children are not entering the project on the same day as the head of household, their information should not be entered until they join the project.

Information for any other adults (18 or older) in the household must be collected directly from those individuals. One adult should not provide information on behalf of another. If a client turns 18 after project entry but before exit, the project should update their record to include any data elements required for adults in order to improve overall data quality or to meet funder requirements.

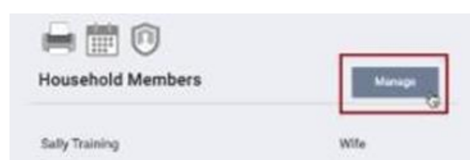
All Clients:
Data must be collected for every adult and child in the household.

Creating Family/Household Groups

1. Verify Household Members in HMIS

- Ensure that each family or household member has a profile in the HMIS (Homeless Management Information System).
- If any household member does not have an existing profile, follow the steps under "Adding a New Client" to create one.

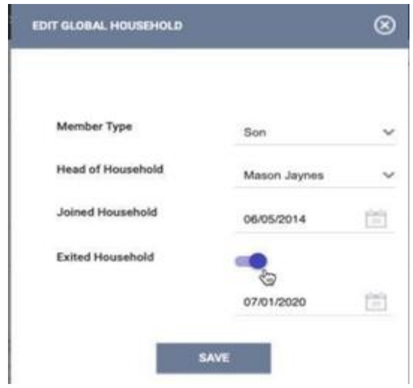
2. Manage Household Members



- Open the profile for the **Head of Household** (e.g., Client X).
- In the upper-right corner of the profile, locate the **"Household Members"** section.
- Click on **"Manage"** to view or edit the household composition.

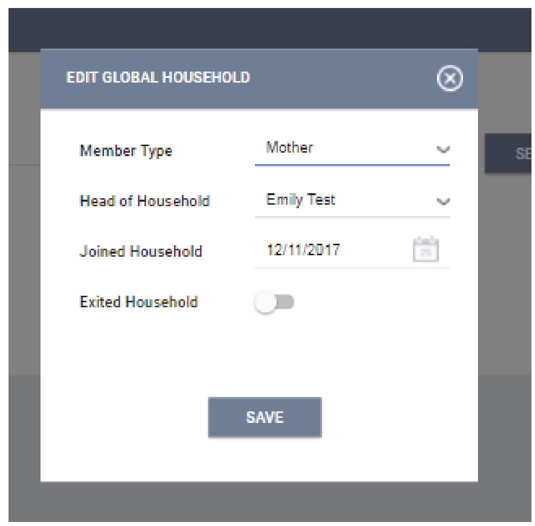
3. Add Family Members to the Head of Household's Group

- If you've recently accessed the profiles of family members, they will appear in the right-side menu under the header "Your Recent Client Searches Accessed."
- If a family member appears in this list, hover over their name.
- A menu will appear—select the option to add them to the Head of Household's group.



When a Member Leaves the Household

- If a household member leaves, go to the Household Management screen and click **"Edit"** next to their name in the Household Members list.
- Enter an **End Date** to indicate when the member left the household.
- This action removes them from the current household while preserving a historical record of their time in the group.



Enrolling Clients into Programs

Enrolling a client or Household in a Program

To enroll a client or household in a program:

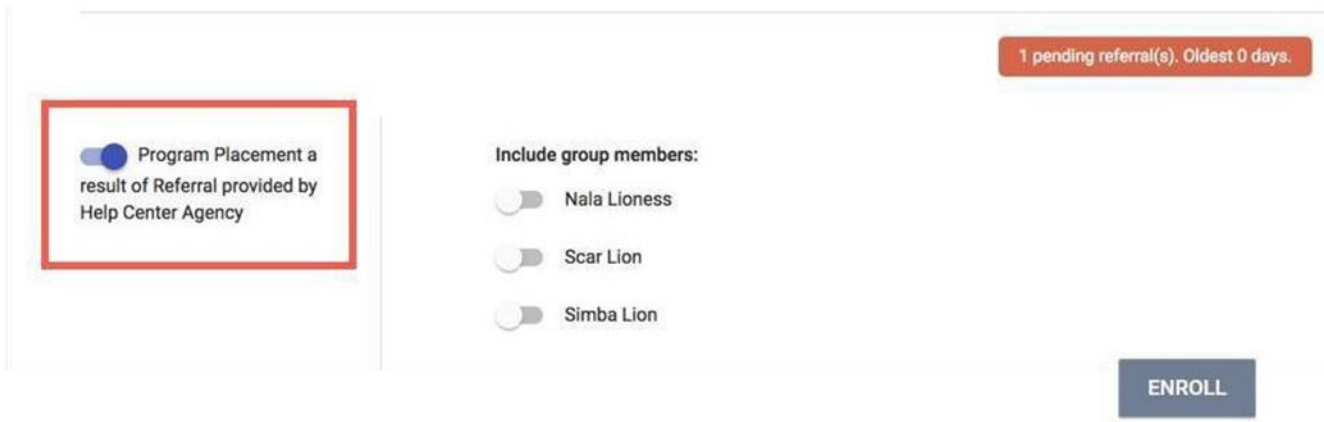
1. Open the client record and click on the **Programs** tab.
2. This tab contains two sections:

- **Program History**:
  Lists programs the client is currently enrolled in or has previously participated in.
- **Programs Available**:
  Displays the current programs offered by your agency that are available for client enrollment.

3. From the **Programs Available** section, select the desired program to begin the enrollment process.

Enrolling a Client/Household into a Program

1. **Expand Program Options**
   - Click the **down arrow** next to the applicable program title under **Programs Available**.
   - Additional options will appear.
2. **Include Group Members (if applicable)**
   - If the client is part of a household or family, you will be prompted to include household members.
   - Use the toggle(s) to select which household members should also be enrolled in the program.
3. **Referral Checkbox**
   - If there is an **open referral** to the program, a checkbox labeled **"Program Placement a Result of Referral by [referring agency]"** will automatically appear with the toggle **turned on** by default.



<u>**Completing the Enrollment**</u>

4. **Enroll the Client (and Household Members)**
    - Click **Enroll** to open the **Program Enrollment** screen for the client.
    - If the client is part of a household, a **"Save & Next"** button will appear.
        - Clicking this will **save the current member's enrollment** and automatically move you to the next household member's enrollment screen.
    - **Important:** All required fields on the enrollment page **must be completed** in order to proceed to the next screen.

NOTE: Program Data Quality

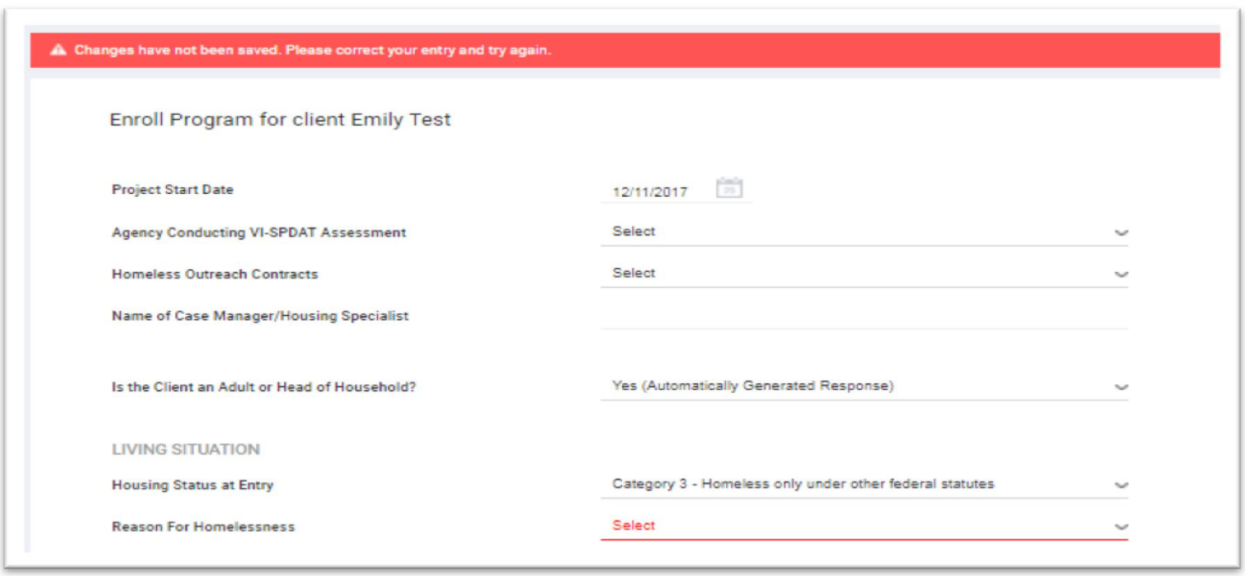
It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to the required APR for your program(s). If any field in the Program Enrollment is unanswered, you will not be able to proceed to the next screen. Missing item will display in red.

Required Fields and Error Messaging

In the example below, **required program fields were left blank**, highlighting the **mandatory data elements** needed to successfully save a client enrollment.

- If any required field is left incomplete, the system will **prevent you from saving the enrollment**.
- An **error message** will appear, indicating which required fields must be completed before you can proceed.

Tip: Carefully review the enrollment screen for any highlighted or marked fields that need to be filled in.



Enrolling a Group Member Mid-program

Adding a New Family Member During an Active Program Enrollment

If a new family or household member joins **after** the program enrollment has already started:

- All additional members must be enrolled **through the Head of Household's profile**.

To enroll the new member:

1. Open the **Head of Household's** client profile.
2. Click on the **"Programs"** tab.
3. Under **"Program History"**, hover over the relevant program name and click the **Edit** icon.

This will allow you to update the household composition and enroll the new member in the existing program.

4. Select 'Add' next to 'Program Group Members

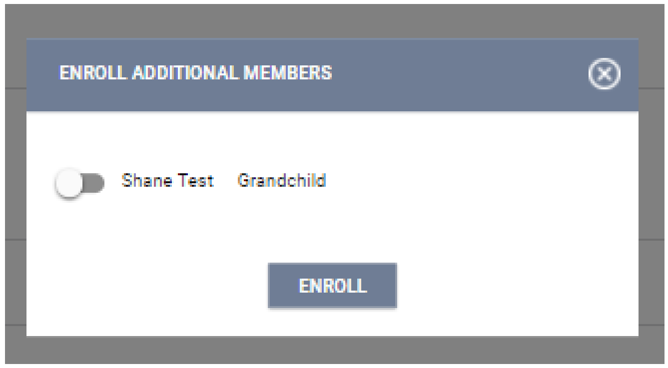
5. Select Additional Household Members

- You will be prompted to toggle **on** any additional group or household members from the profile list.
- Select all members who need to be enrolled, then click **"Enroll."**

6. Complete Enrollment for New Members

- Fill out **all required fields** on the enrollment page(s) for the new enrollees.
- Click **"Save & Next"** to proceed.

- If multiple members are selected, the enrollment screen for the next member will automatically appear until all have been completed.



Making the Client Record Private

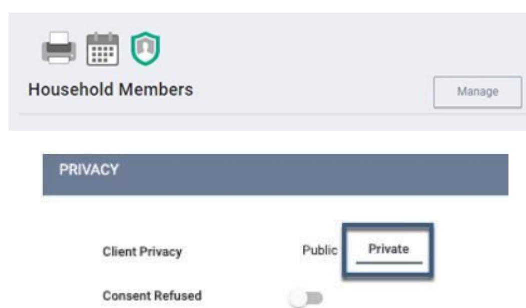
Sometimes, an individual client or household may request that their data **not be shared outside the agency** providing their services. In these cases, the client record—or parts of it—can be marked as private.

Important Notes:

- **System administrators** have access to all client data, even if marked private.
- Only **staff members assigned to** or switched into the agency where the data was recorded can **edit privacy settings**.

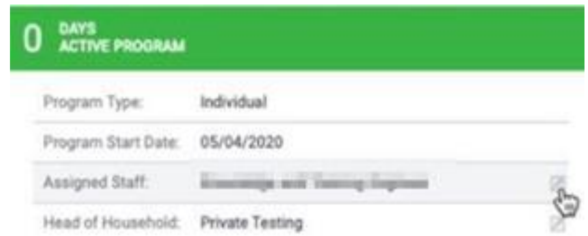
To mark a client record as private:

1. Navigate to the client record and click the **Privacy Shield icon** located in the upper-right corner.
2. Select **Private** and click **Save Changes**.
3. Repeat these steps for **each household member** to ensure complete privacy.



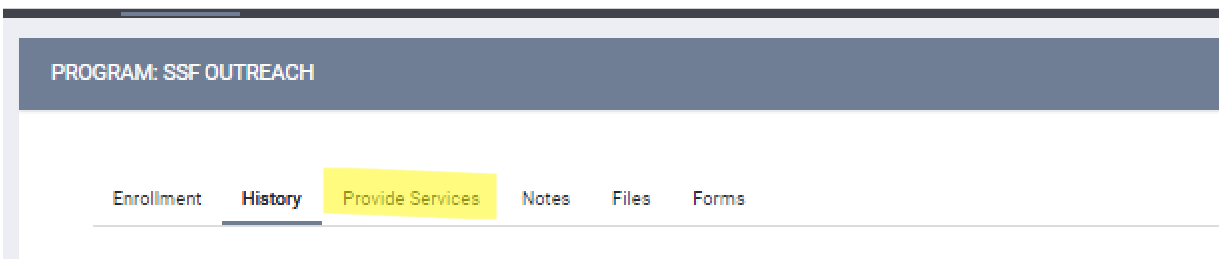
<u>**Making a Program Enrollment Private**</u>

1. Navigate to the program enrollment within the client record.
2. Click the **Edit** icon next to **Assigned Staff**.
3. Toggle on **Make Program Private**.

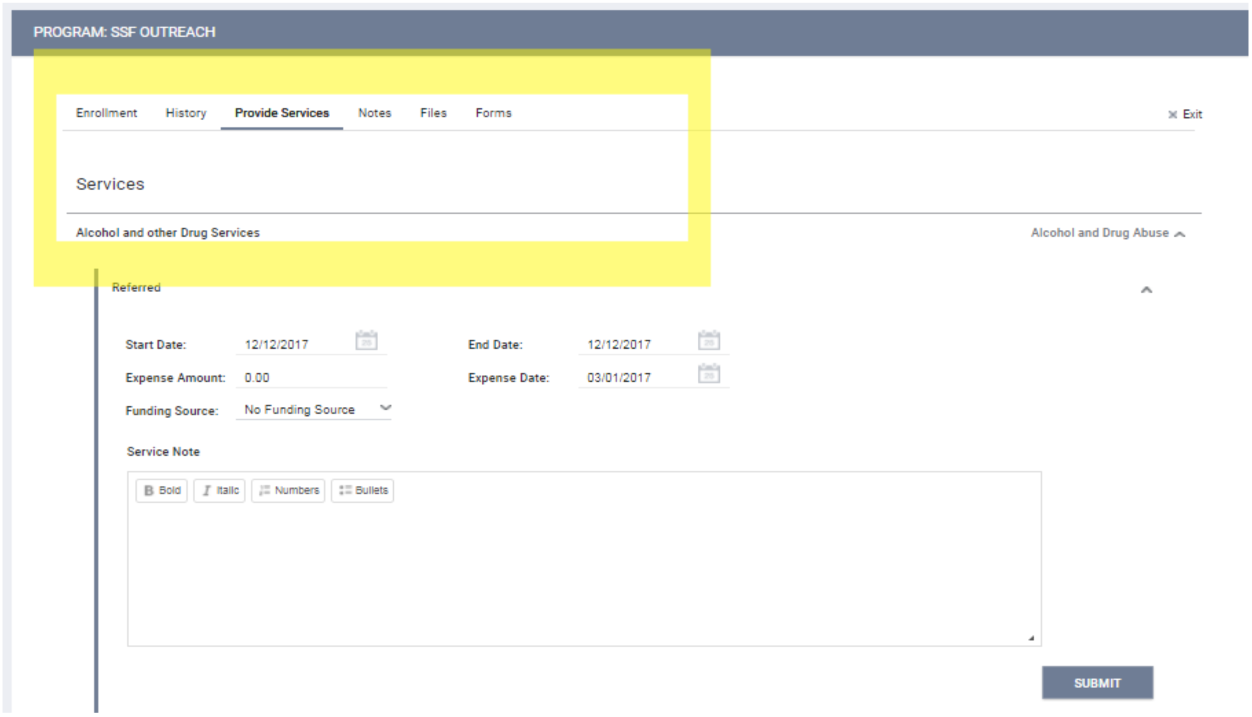


Adding Program Services

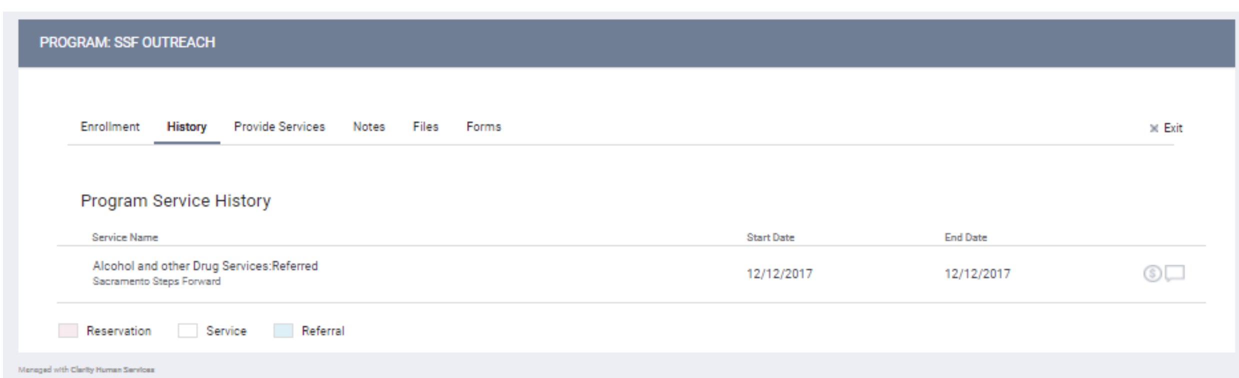
Once all enrollments are complete, the **"Provide Services"** tab will appear for the **main client (Head of Household)** within the program.



- Select this tab to view the various services offered by the program.
- When selecting a service to provide:
  - Enter the **Start Date** and **End Date** for the service.
  - Record any **expenses** associated with the service.
  - Verify the correct **funding source** is selected, if applicable.
  - Checkmark any **group members** who should also receive the service.
- For services with an **"End Date"** field, it is recommended to project the End Date into the future to prevent the service from being disabled prematurely.
  - For example, if your program lasts 90 days and allows extensions, it is best practice to set the service End Date a few months beyond program entry.
  - **All service End Dates must be updated as needed and should never exceed the client's actual program exit date.**



- All active services will be displayed at the bottom of the **Exit screen**.
- After entering service details, click the **Submit** button to save changes.
- To add more services, return to the **Programs** tab and repeat the process for each additional service.
- Once complete, both the **program enrollment** and all **associated services** will be visible under **Program History**.



NOTE: Auto-Enroll Services

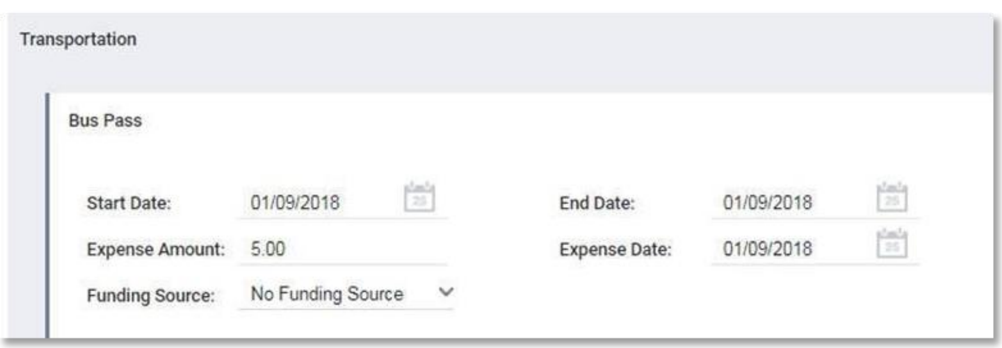
This is a great feature that could be enabled to automatically add service(s) items upon Program Enrollment.

If your agency is interested in this feature, contact the HMIS Lead. Please note that not all services can be set to "Auto Enroll" because not all services are provided to both children and adults.

Recording Services with Funding Options

Some service items include fields related to funding, such as **Expense Amount**, **Expense Date**, and **Funding Source**. The display and behavior of these fields depend on the service's configuration settings:

- **Expense Amount:**
  - This may be an adjustable amount entered by the user, or a fixed amount that cannot be changed.
  - The amount is based on the **Default Amount** and **Adjustable** settings defined in the service item configuration.
- **Expense Date:**
  - The date selected by the user that corresponds with when the expense is recorded or applies, linked to the funding source.
- **Funding Source:**
  - This may be automatically set or manually adjustable, depending on the **Automatically Charge** and **Adjustable** settings configured for the service item.

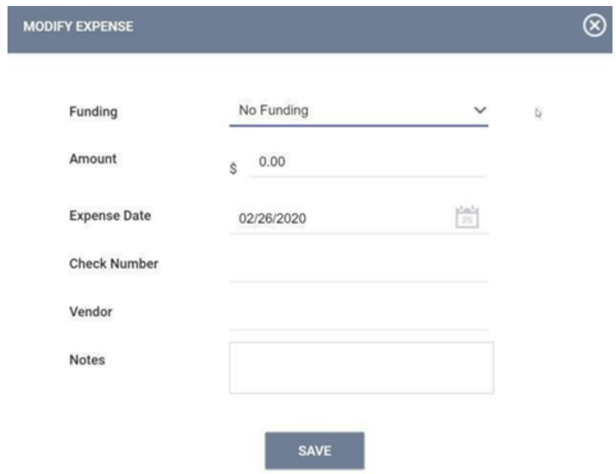


Some services may have a **default expense value** associated with them—such as a *Bus Pass*—which could be fixed or adjustable depending on the configuration:

- The **Expense Amount** field may be pre-filled with a default or fixed amount.

- In some cases, you can **modify the expense amount** manually.
- If you require customizations to service items, please contact the administrator at: **HMISSupport@KernHMrIS.com**

To **edit an existing service**, hover your mouse over the service item and click the **edit icon**.



Status / Annual Assessments

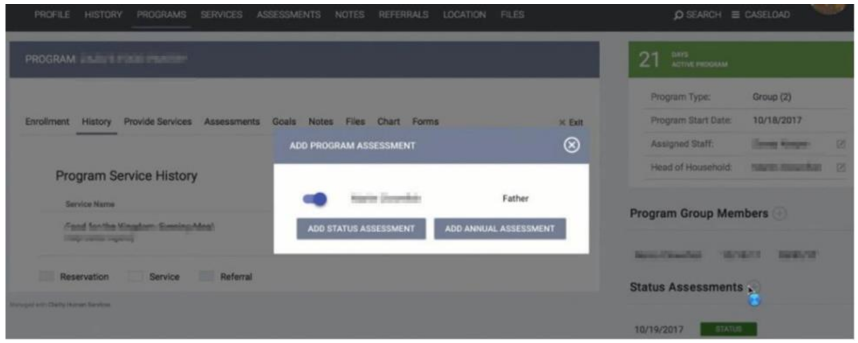
1. **Annual Assessments** must be completed for all active clients within a specific window: From **30 days before** to **30 days after** the anniversary of the Head of Household's project entry date.
2. **Status Assessments** are used to document significant changes in a client's situation and can be completed **at any time** as needed.

Adding a Status / Annual Assessment

To conduct a status or annual assessment:

1. Navigate to the **Programs** tab or **History** tab within the client record.
2. Locate the program enrollment you want to assess and click the **Edit** icon next to it.
3. Click the **Add** button next to **Status Assessments**.
4. Choose either **Status Assessment** or **Annual Assessment**.
5. Select the client(s) to include in the assessment.
6. Click **Save & Close** to complete the process.

Note: Some fields may already be filled in because data carries over from the enrollment or the most recent assessment.



Notifications for Assessment Due Dates

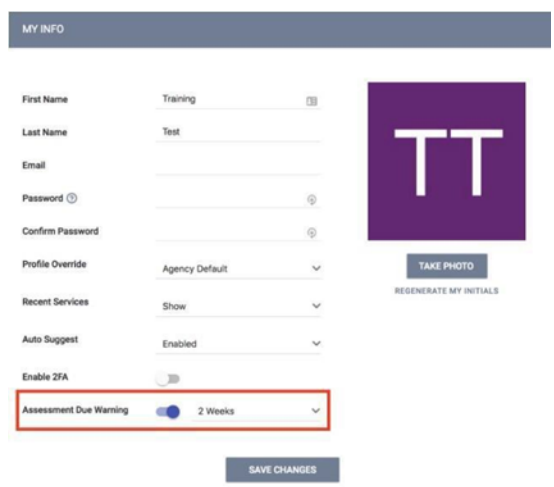
When a Status Assessment is due in a client record, Clarity Human Services sends a reminder ("Assessment Due Warning") to notify the assigned staff member that the due date is approaching

What If I'm Not Receiving Notifications?

First, verify that you're the assigned staff member for the enrollment. If another staff member is reassigned to the enrollment, they can update the notification settings at the enrollment level.

What If I Don't Want to Receive Notifications or Want Them on a Different Schedule?

You can adjust the Assessment Due Warning setting for your caseload in your Account Settings. However, this change will only apply to enrollments you're assigned to after the update. Existing client records will continue to follow the previous notification schedule until the end of their enrollments. Alternatively, you can modify the Assessment Due Warning setting at the enrollment level.



<u>To Change the Assessment Notifications at the Program Level</u>

Click the edit icon located under the Status Assessments in the right sidebar.

Note: This setting will override the Assessment Due Warning notification at the staff-member level.

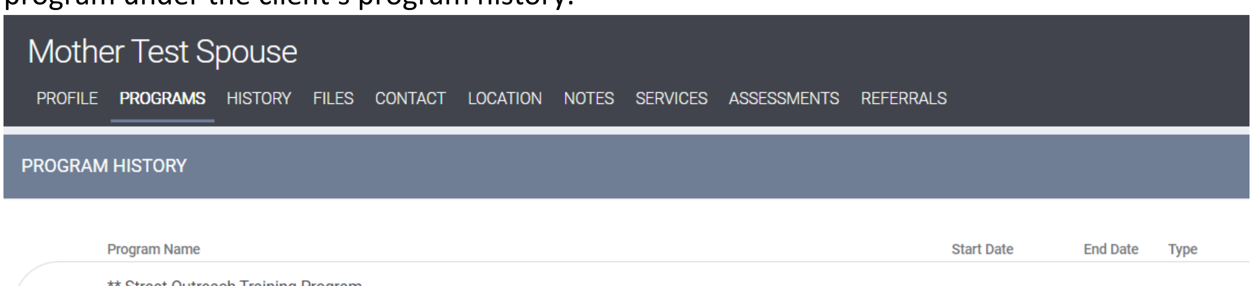
Current Living Situation (CLS)

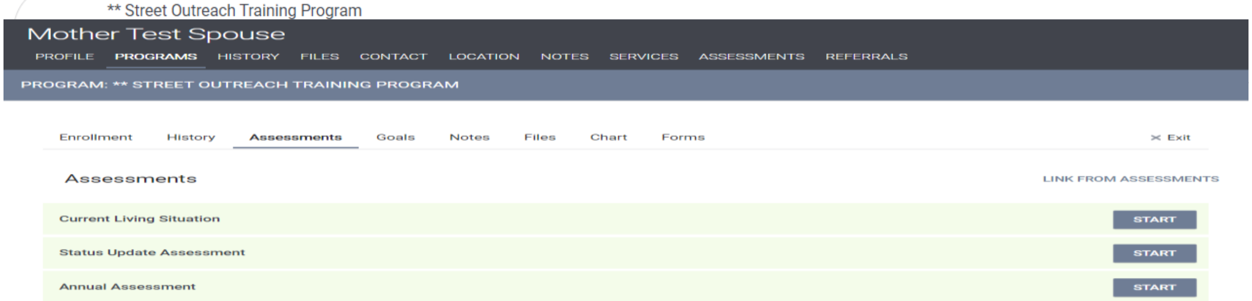
Current Living Situation Assessment Requirement for Bakersfield-Kern CoC

For the Bakersfield-Kern Continuum of Care (CoC), the Current Living Situation assessment is required for Emergency Shelter programs, Street Outreach programs, and Services Only/Supportive Services Only (SSO) programs. The purpose of this survey is to document each contact with individuals experiencing homelessness through street outreach and other service projects. It also tracks the number of contacts necessary to engage the client and helps document their current living situation when required in any applicable project.

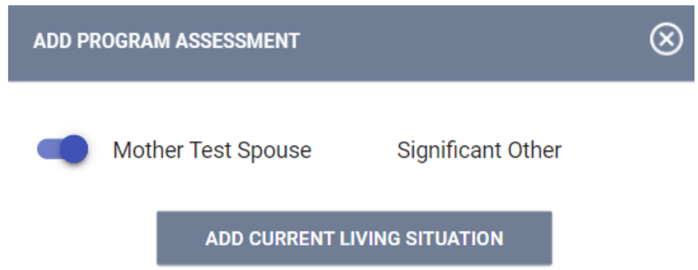
<u>Starting the Assessment</u>

1. Click on the Programs Tab in your client's profile. Select the edit button on the active program under the client's program history.



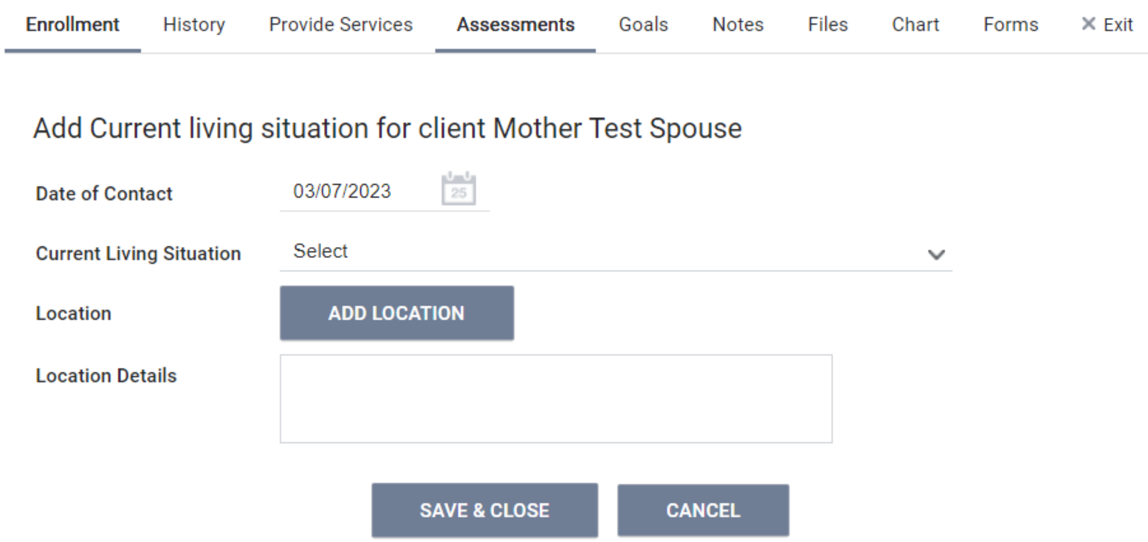


3. Click the "Add Current Living Situation" box to move to the assessment screen.



Record Current Living Situation (CLS) details

4. To complete the current living situation assessment, fill out the questions below:



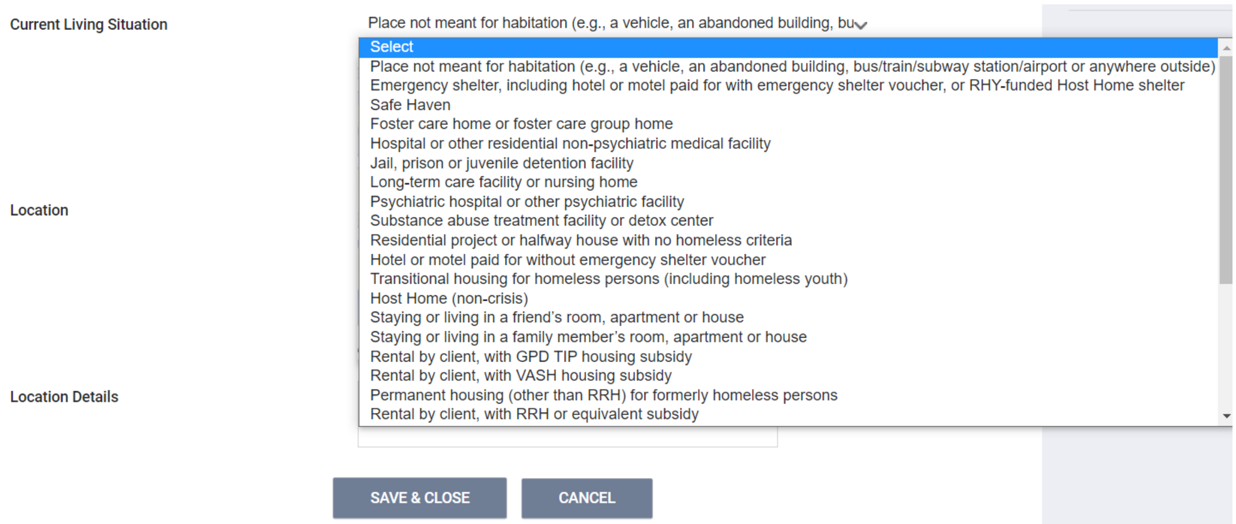
Date of Contact

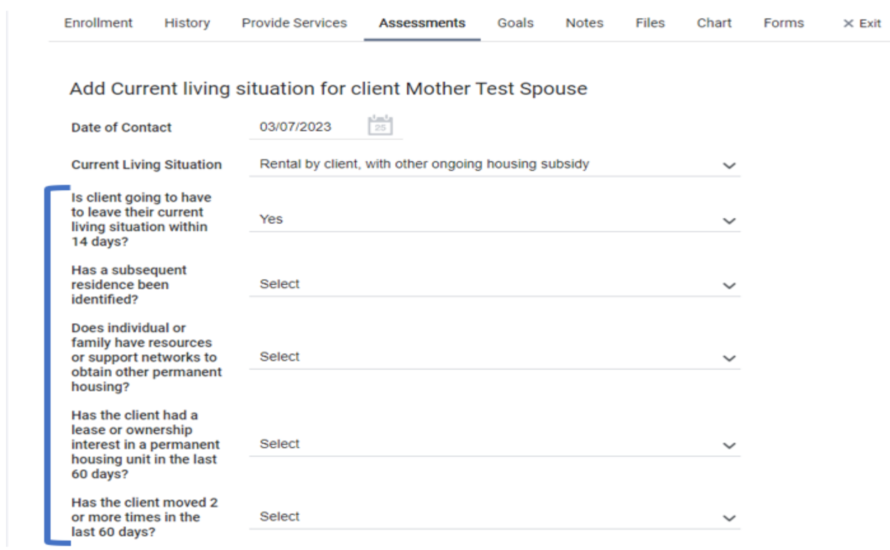
Add in the **first date of contact** with the client. This date should be the same as the Start Date for the client's program enrollment. Any additional CLS assessment entered thereafter will be the engagement's date of contact.

Current Living Situation

If client's Current Living Situation (CLS) is a literally homeless, temporary, or permanent situation, record additional housing status information to calculate imminent and at-risk of homelessness housing statuses based on HUD's definition of homelessness.

Select appropriate option from the drop-down menu:





- 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 contact made at project exit.

- Contacts that require the collection of Current Living Situation such as Street Outreach and Supportive Services program, include activities such as a conversation between a street outreach worker and client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service.

Exiting a Client from a Program and Services

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

To exit a client from a program, go to the Programs tab in the client's record. Hover your mouse over the program enrollment and click the Edit icon that appears to the left.

Next, select ‘Exit’ on the right-hand side of the program menu.

When exiting a household, you’ll see an option to exit multiple household members. Toggle the switch next to the member(s) you wish to exit. You can either select all clients to exit from the enrollment or a smaller subset. Once you click the **End Program** button, the selected clients will be prompted with exit screens in sequence for each household member.

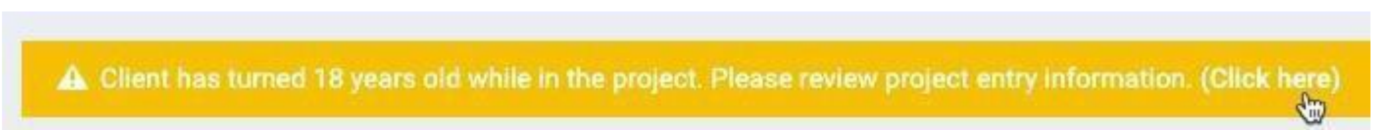
Fill out the exit screen and click **Save & Next** at the bottom to move to the next client's exit screen. Once all clients have been processed, the button will change to **Save & Exit.**

Ending Open Services

If your client has any services scheduled for after the exit date, you'll see an 'Open Services' section on your exist screen so that you can end them before or on the actual program exit date.

<u>Exiting a Client Who Has Aged into Adulthood</u>

The HMIS Data Standards Manual requires updates for certain data elements when a child transitions into adulthood (18 years old) while enrolled in a program. To meet this requirement, when exiting a client who has aged into adulthood, a ribbon will appear at the top of the page to notify the staff member.



Clicking the banner will redirect the staff member to the program enrollment screen of the client who has aged into adulthood.

<u>Program Auto-Exit Functionality</u>

If auto-exit is enabled for a program, a client will be automatically exited when specific criteria are met. For more details about the auto-exit feature, please contact the system administrator at HMISSupport@KernHMIS.com

Additional System Features

Adding a Client Photo

Your client may consent to sharing a photo in their Release of Information (ROI). Uploading photos to your client files can provide a quick method of identification.
Within your client's profile, hover over the image box and select 'Update Profile Photo'

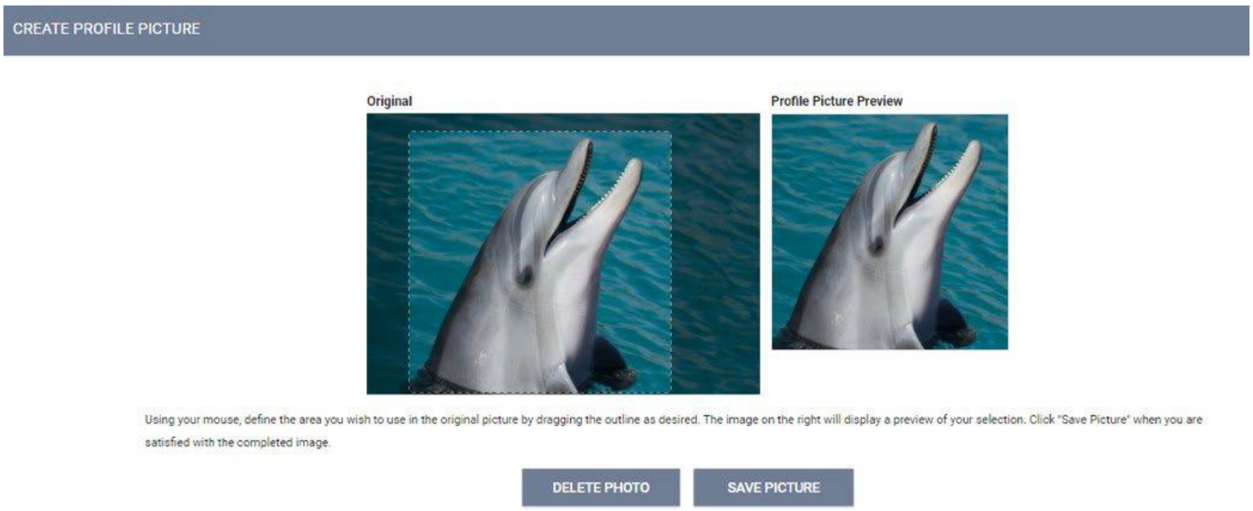
Adding a Photo

If you have a **web/device camera**, you may take a picture instantly or after 3 seconds from that device.

Otherwise, **take a photo externally** (with a camera or camera phone) and upload the photo to your computer. Select the file from the 'Upload Photo' portion and hit the 'Upload' button.

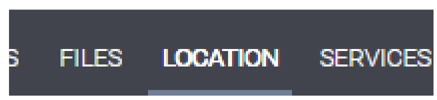
Refocusing the Photo

You may wish it re-center of the photo to fit the dimensions of the image box. Use your cursor in the 'Original' box to redefine the focus of the image.



Adding a Client's Active Address or Contact Information

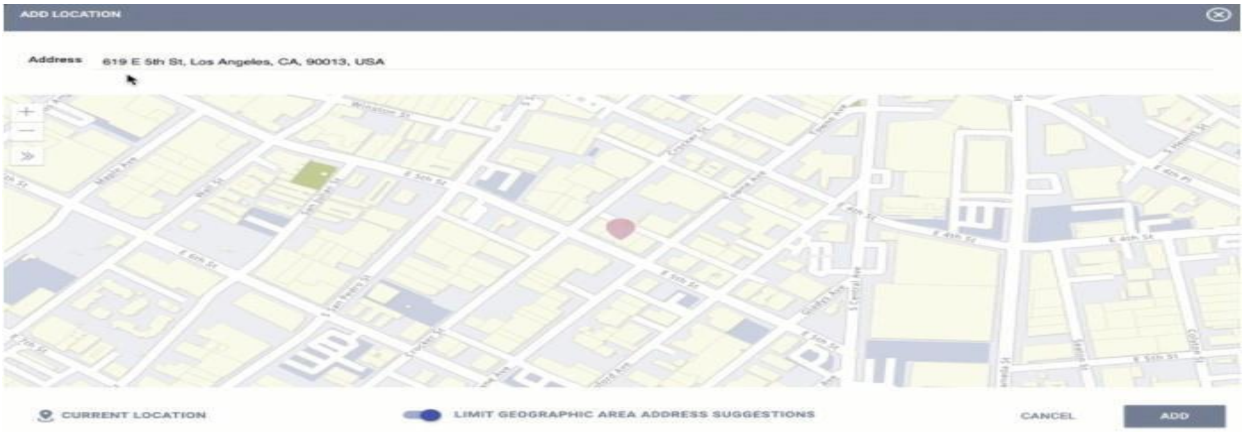
Select 'Location' on the main menu bar.



Select 'Add Address' in the upper-right hand corner.
(You can select the pointer icon to allow your device/browser to find your current location – but it will not be added as a client location)

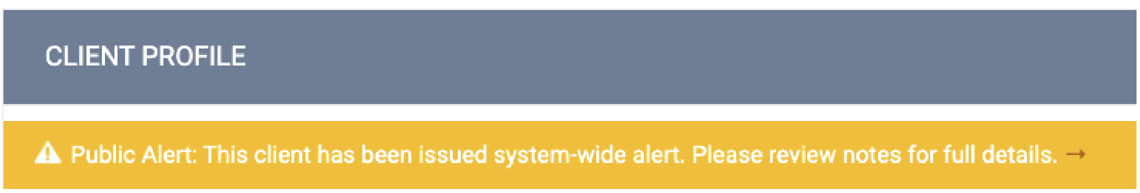
Add the details for your client's location type in the next screen and save.

Your client's location will now appear on the map.



__Public Alerts__

Public Alerts are used to highlight important information within a client record by displaying an alert. In the client record, this appears as a gold banner across the top of the **Client Profile.**



Examples of How Public Alerts Can Be Used

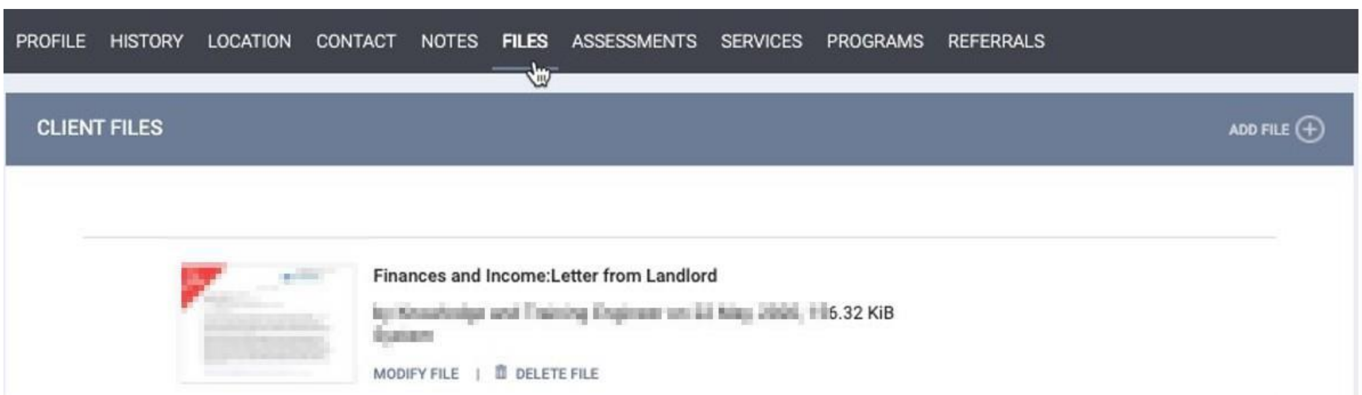
- **Locating clients for services or referrals**: e.g., "Please have Jane Doe call our agency for rental assistance.
- **Indicating housing availability**: e.g., Housing opportunity available for client.
- **Language access and support**: e.g., Client speaks Spanish as primary language "to inform other providers.
- **Lost and found items**: e.g., Client has lost an item" or "An item belonging to the client has been found.

<u>Uploading Files</u>

Staff members can upload, manage, and share files directly within client records in Clarity Human Services. These files can be kept private within the agency or shared across agencies, depending on the needs of the community. There are no limits on the number or type of file formats that can be uploaded.

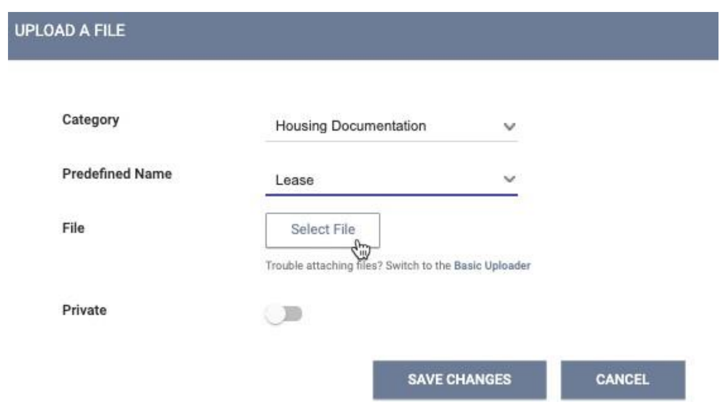
Examples of file usage include:

- Uploading third-party documentation of homelessness
- Scanning and storing client identification forms
- Saving agency agreements and signed policies
- Sharing files as part of the community's Coordinated Entry process



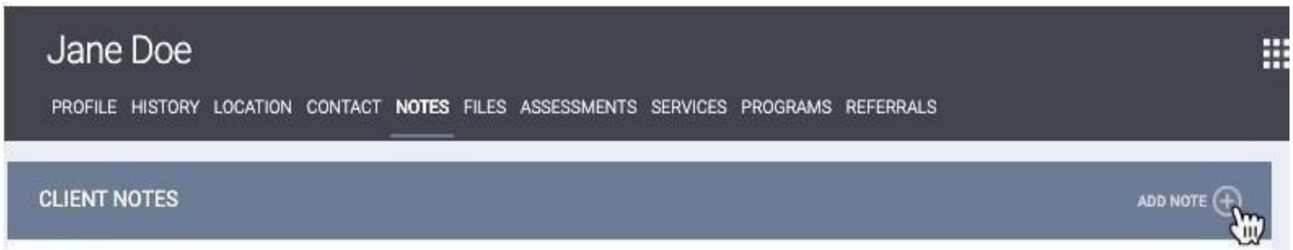
<u>To upload a new file in Clarity Human Services:</u>

1. Click **Add File**.
2. Select the appropriate **Category** and enter a **Name** for the file.
3. Click **Select File** to choose the file from your device.



Adding Case Notes

The **Notes** tab allows staff members to record and share notes within the client record. Depending on the agency's sharing settings and the staff member's access role, notes can be shared, edited, and deleted both within and across agencies. Additionally, a note can be marked as **private** to the agency of the user who created it, regardless of the agency's sharing settings.

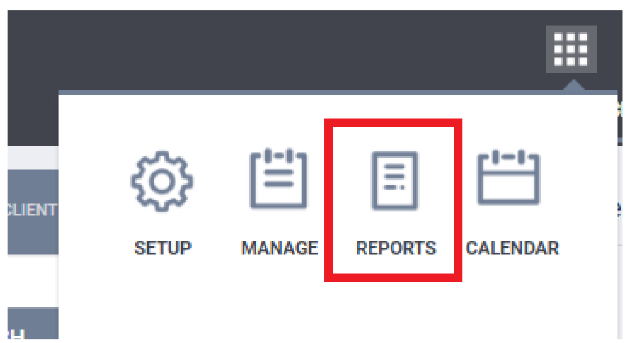


To add a case note, click on the **"Notes"** tab in the client file. In the upper right corner, click on **"Add Note"**

Report Library

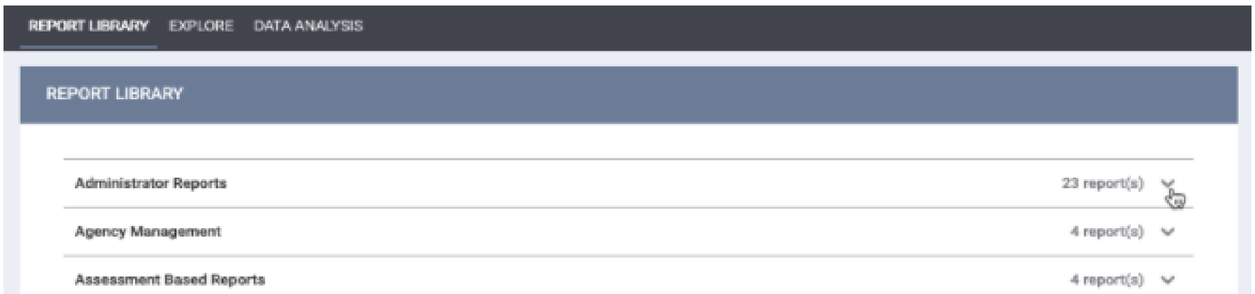
Running a Report

To run (or schedule) a report, select > 'Reports'.



Navigating the Report Library

The Report Library is organized into sections based on report categories. To view the reports within a category, click the **down arrow** on the right side of the category header. This will expand the section and display all available reports in that category.

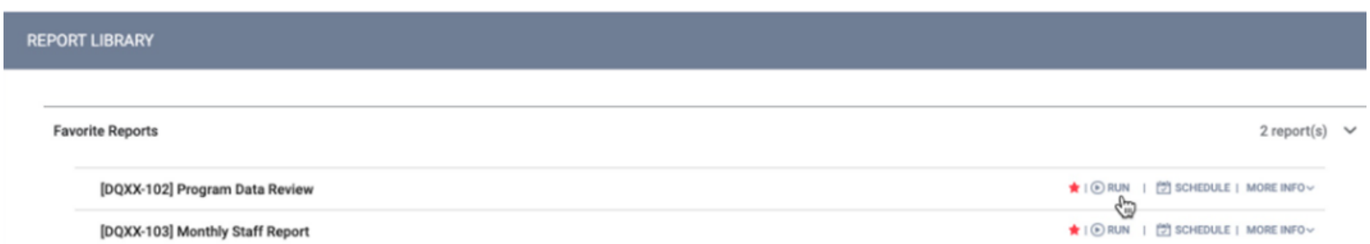


Note:
The report sections visible in the Report Library depend on the configuration set by system administrators. Access to specific reports is also controlled based on a user's **Access Role**.

To learn more about a particular report, click **More Info** (please note that this option is not available for all reports).

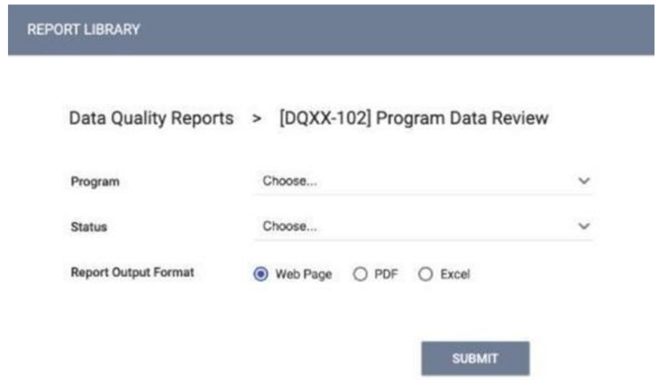
How to Run a Report

1. Select **'Run'** to begin.

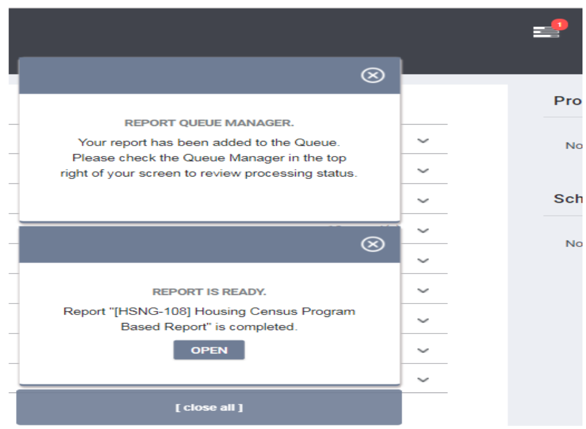


2. Enter the required parameters for the report—such as services, programs, or funding types.
   Note: Parameters may vary depending on the specific report you are running.
3. Choose your preferred output format:

- **Web Page**: Allows you to interact with and drill down into data elements to view the underlying data.
- **PDF**: Ideal for official documentation, grants, and record-keeping.
- **Excel File**: Useful for organizing and manipulating data in Excel (e.g., sorting, checking for duplicates, etc.).

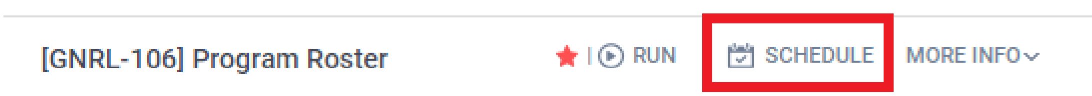


4. When ready, click the **'Submit'** button to run the report.
5. You'll be notified that the report is being queued. Once it's ready, an alert will appear in the **Queue Manager** at the top right of your screen.
6. To view the report, click the **Queue Manager** icon and select **"OPEN"**, or use the **"OPEN"** button in the pop-up box.

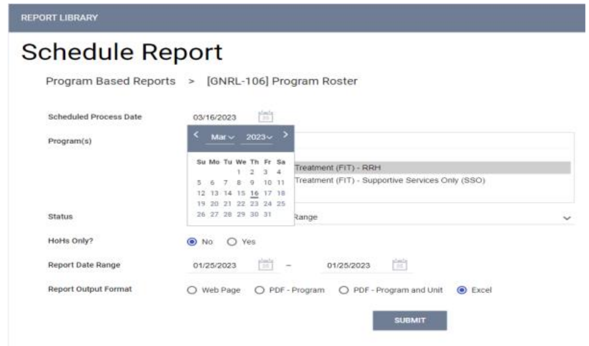


Scheduling Reports

Scheduling reports allows users to specify a date and time for the system to automatically run a report. To schedule a report, click **"Schedule"** next to the desired report in the **Report Library**.

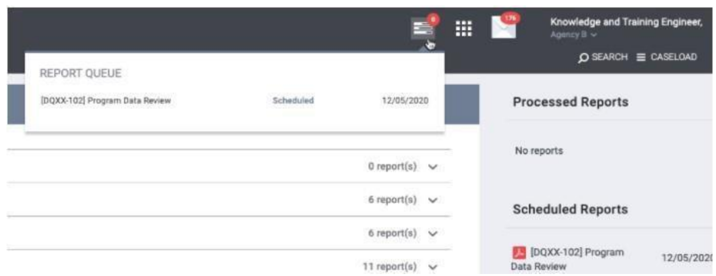


Select the date you'd like to have the report automatically run in the 'Scheduled Process Date', Include the specifics depending on the report you are running, Report Date Range, Report Output Format and Submit.



The scheduled report will appear in the **Scheduled Reports** section of the right sidebar, as well as in the **Report Queue** once it begins processing.

You can cancel a scheduled report by clicking the **Delete** icon next to it in the **Scheduled Reports** section.

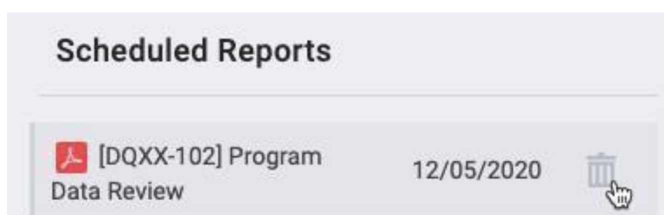


Coordinated Entry Enrollment and Services (CES)

<u>Coordinated Entry (CE) System Overview – Kern County</u>

Coordinated Entry (CE) is the system designed to assist all Kern County communities in ending homelessness by providing a clear, systematic, and equitable process to help individuals quickly access the most appropriate available services. This is achieved through:

- Regulated access points
- A standardized assessment process
- A coordinated referral (match) system for homeless prevention, housing, and other related services



The **U.S. Department of Housing and Urban Development (HUD)** mandates that all **Continuums of Care (CoC)** establish and operate a CE process. Furthermore, all recipients of

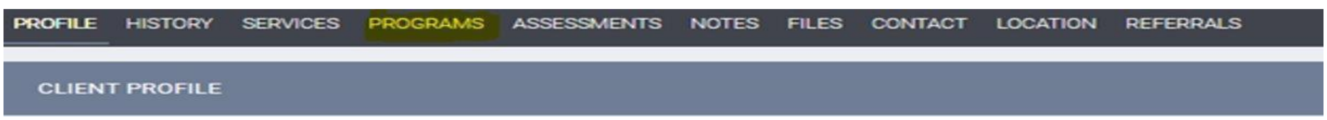
CoC Program and Emergency Solutions Grant (ESG) funding within the CoC must utilize this CE process.

The **goal of the Coordinated Entry System (CES) policies and procedures** is to ensure that every **Bakersfield-Kern Regional Homeless Collaborative (BKRHC)** member, whether CoC-funded or not, maintains an "open-door" policy. This ensures accessibility for individuals who may frequently relocate or visit multiple agencies in pursuit of housing and stability.

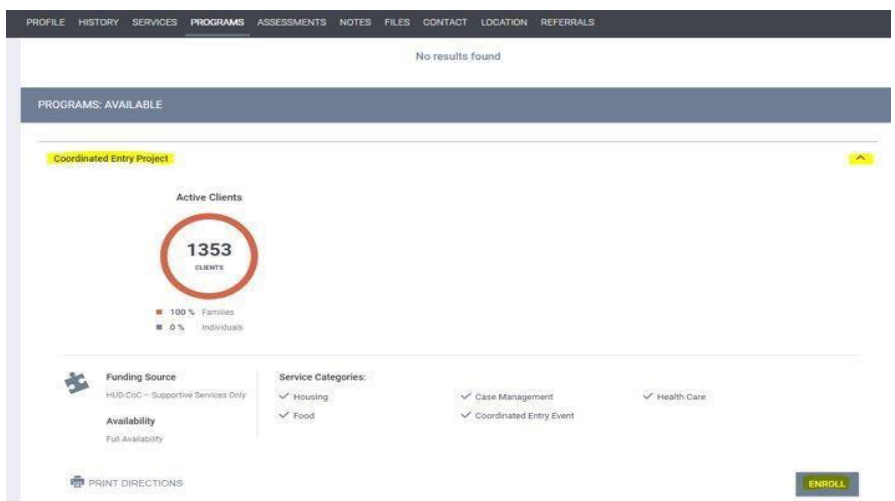
BKRHC operates one **centralized Coordinated Entry project**, under which all CE-related data collection is conducted.

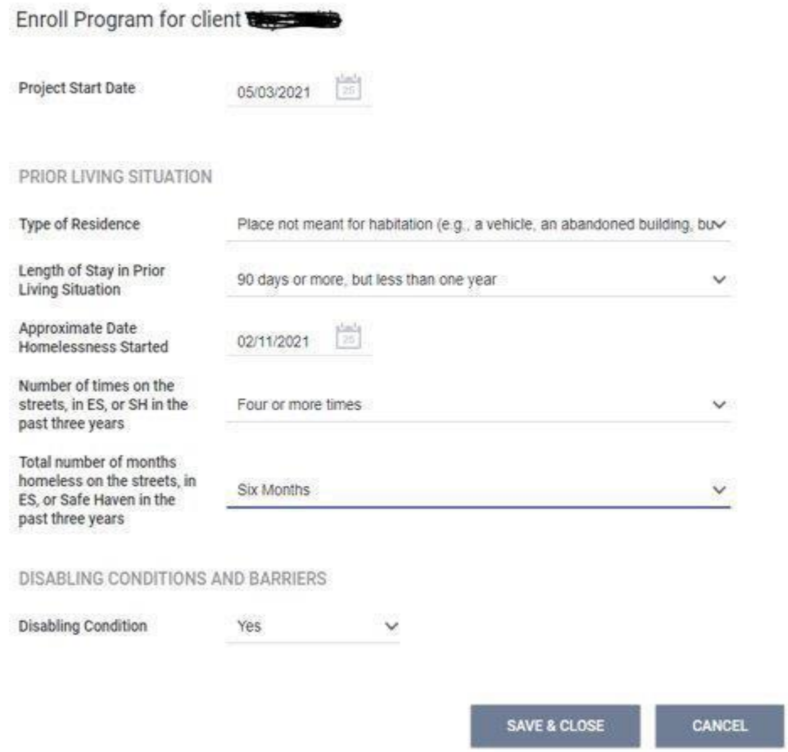
<u>**How to Enroll in Coordinated Entry**</u>

Once the client has been added to HMIS, select **"Programs"**, then choose **"Coordinated Entry Project"**, and finally click **"Enroll."**



Complete all required fields in the **"Enroll Program for Client"** screen.



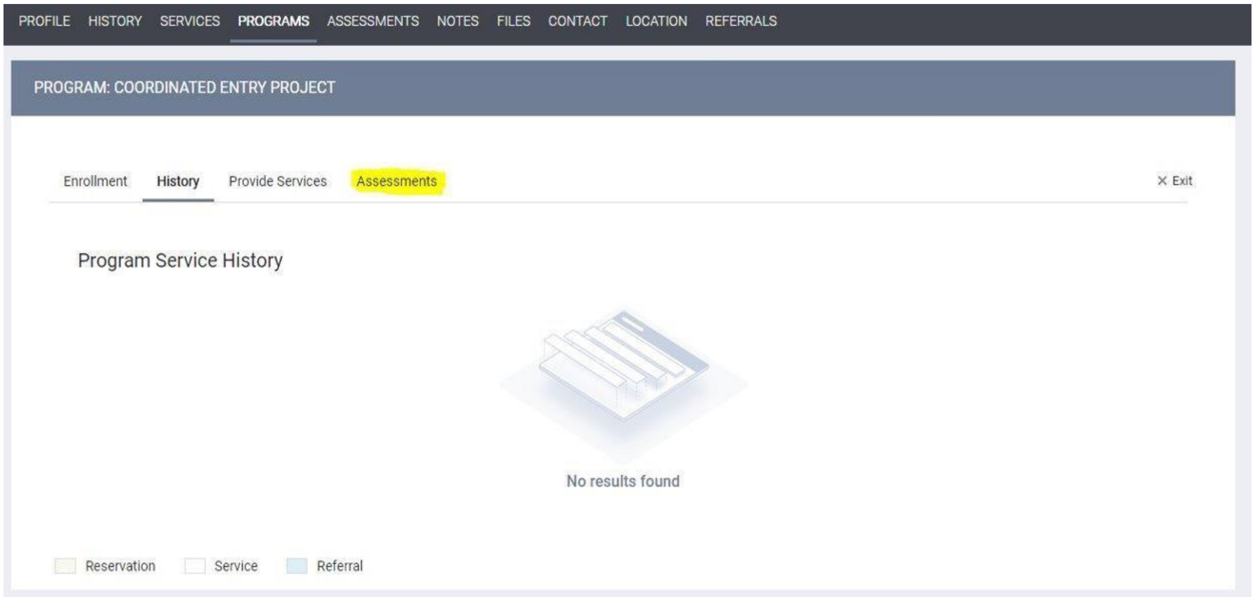


<u>How to Add a VI-SPDAT (Vulnerability Index – Service Prioritization Decision Assistance Tool).</u>

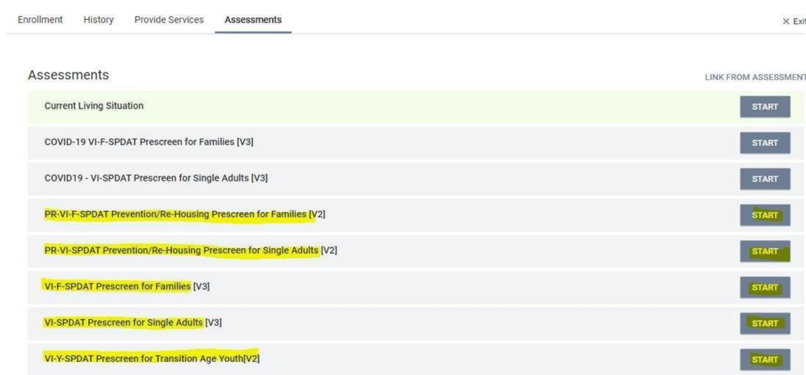
- Navigate to the client’s **Program Enrollment** page.
- Select the **Assessments** tab.
- Click **Start** to begin a new assessment.
- From the list of available assessments, choose **VI-SPDAT**.
- Complete the VI-SPDAT questionnaire by answering all required questions.
- Once finished, click **Save** to record the assessment.
- Confirm that the VI-SPDAT has been added to the client’s record.

Once the VI-SPDAT has been entered and saved, you can refer the client to the community queue by following these steps:

1. Click **Eligibility**.
2. Toggle the button to the default assessment type (VI-SPDAT or PR-VI-SPDAT).



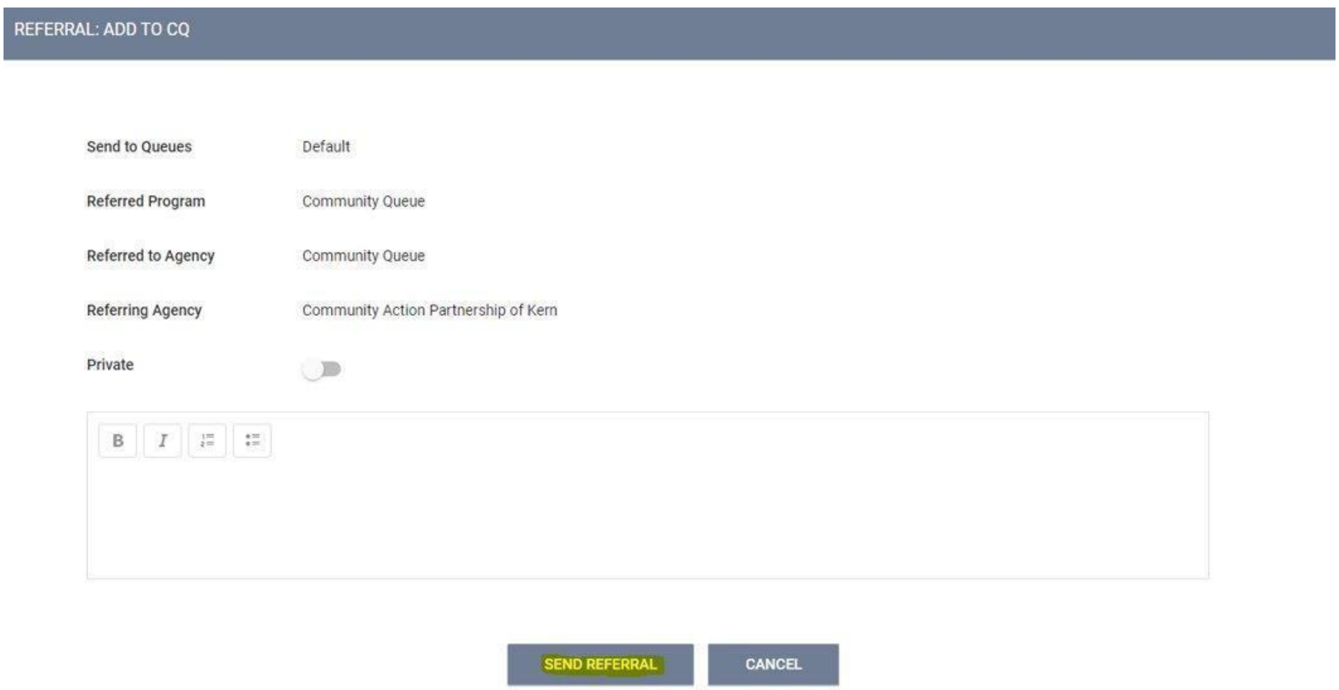
3. Select **"Refer Directly to Community Queue"**.
4. Click **"Send Referral"** to complete the process.



How to Add an Event for CE

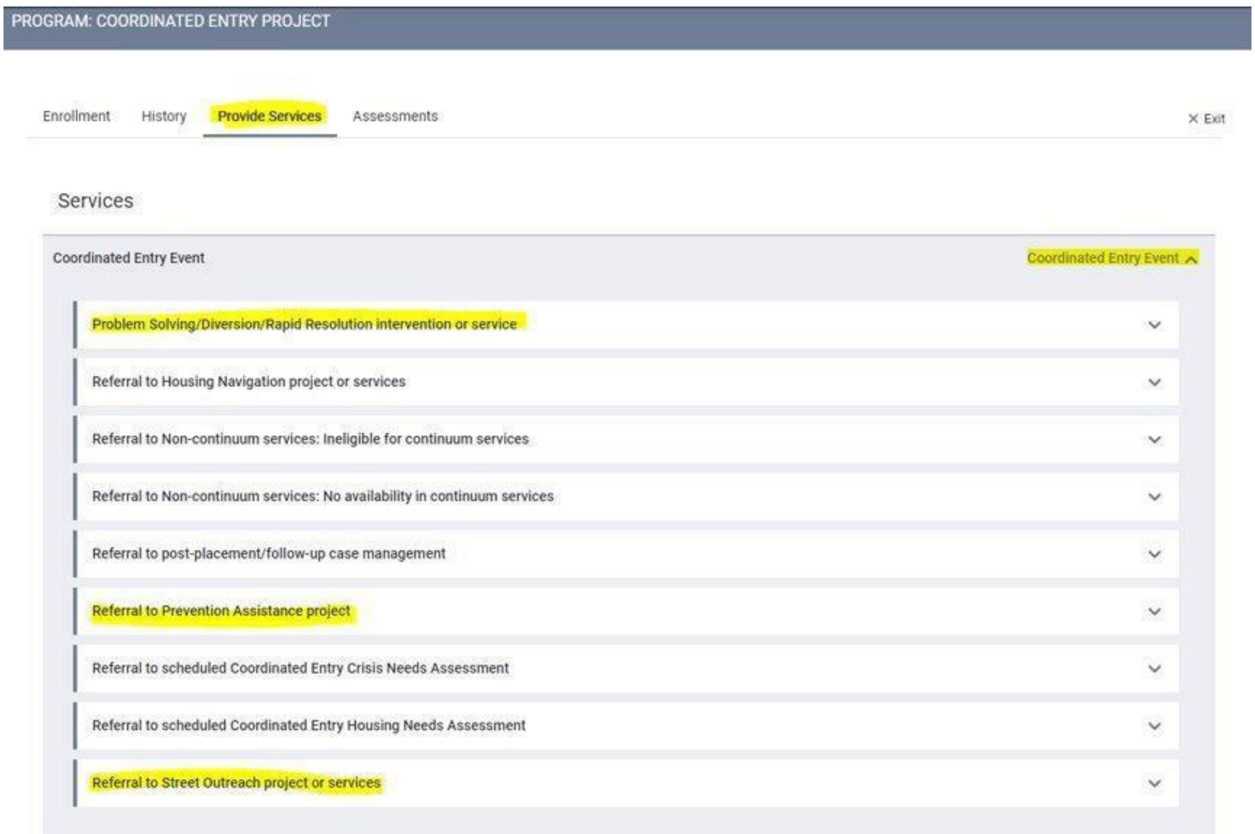
Types of Coordinated Entry (CE) Events:

- Referral to Prevention Assistance
- Referral to Diversion/Rapid Resolution
- Referral to CE Housing Needs Assessment (VI-SPDAT)
- Referral to Street Outreach



How to Record a CE Event:

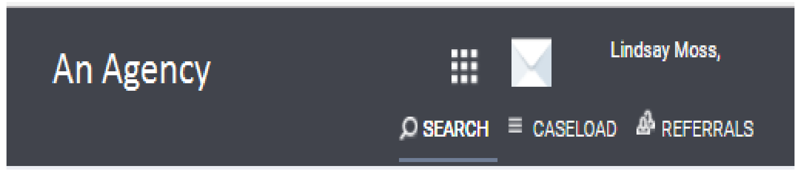
1. Within the **Program Enrollment**, select **Provide Services**.
2. Click on **Coordinated Entry Event**.
3. Choose the appropriate service type from the list.
4. Fill out the required information.
5. Submit the form to complete the entry.



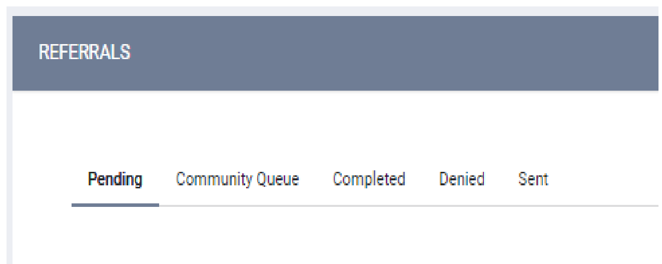
Referrals Tab

How to View a Client from the Pending Tab

The referrals tab can be accessed from the Client Search option.



Handling Referrals in the System

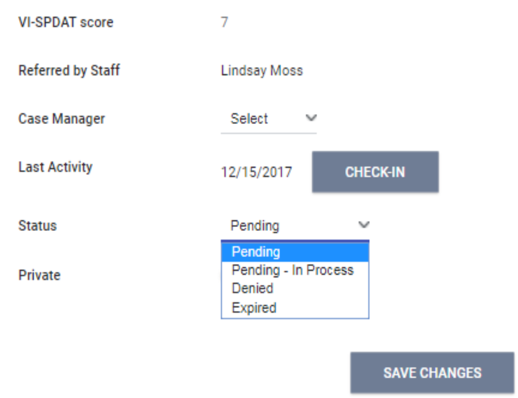


- When a referral is sent to your agency and you are the designated recipient for that project, you will receive an email notification containing the client's **Unique Identifier (UI)**.
- Paste the UI into the search box in the **Pending** tab of the **Referrals** section.
- To work with the client in the **Pending** tab, hover over the client's name:
  - Click **Edit** to view the referral details and any notes. From here, you can mark the client as **"Pending – In Process"**, or deny the referral and send it back to the **Community Queue** tab.
  - Clicking the client's name will take you to their **Profile** screen, where you can enroll the client into your project once they are housed.

Changing a Referral Status to 'Pending – In Process'

After opening the referral by selecting the **Edit** option:

1. Use the drop-down menu to change the status to **"Pending – In Process"**, then save your changes.
2. Scroll down to the **Notes** section and write a brief update.
3. Click the **Send Note** button to save it.

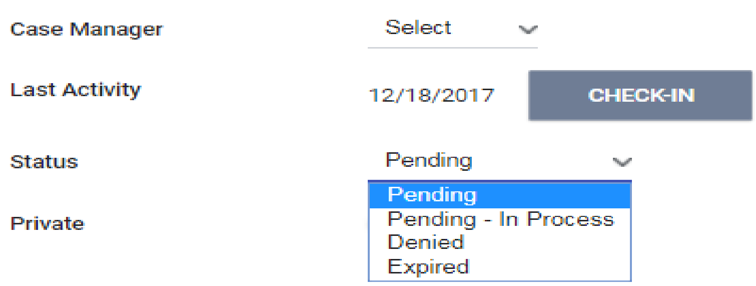


Tip: Be sure to enter a note weekly during the period between your intake appointment and when the client is housed and enrolled in your project.

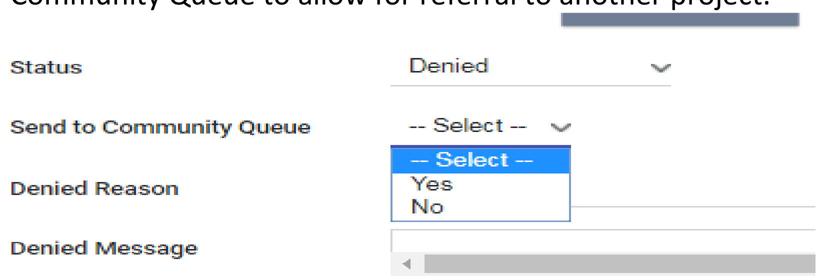
Denying a Referral

If you need to deny a referral, such as when a client refuses your services, go to the **Pending** tab in the referral screen and open the referral by selecting the **Edit** option.

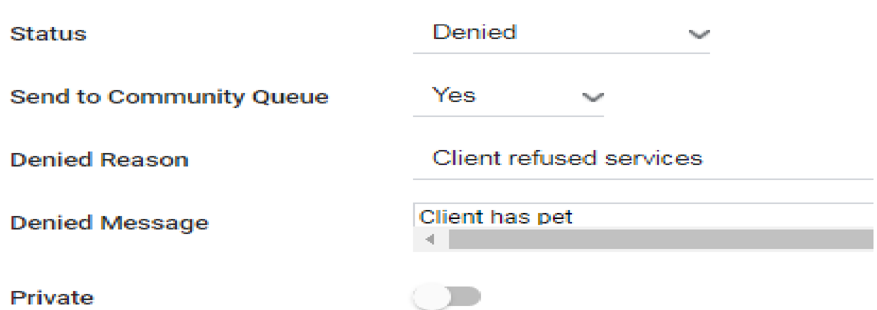
- Use the drop-down menu to change the status to **"Denied"**. This will reveal additional fields:



- Set **"Send to Community Queue"** to **Yes**. All denied referrals must be returned to the Community Queue to allow for referral to another project.



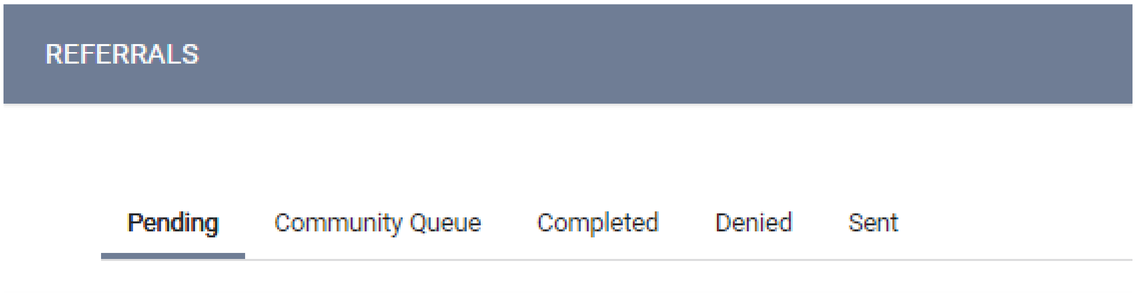
- Under **"Denied Reason,"** select the most appropriate reason from the drop-down menu for why your agency is denying the referral.
- In the **"Denied Message"** field, write a note explaining why the client is being denied.



- **Do not check** the **"Private"** box.
- Click **Save Changes**.
- Upload a denial letter for the client in the **"Files"** tab of the client's profile page.

Working With the Other Referral Tabs

In addition to the Pending tab, you will also see four additional tabs that are available to view data.



Community Queue:
This tab displays the full list of clients in the Community Queue. It is managed by CAPK in Bakersfield-Kern County. ***You will never need to work in this tab.***

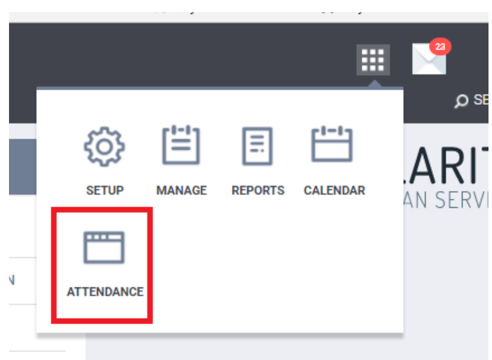
Completed:
This tab shows all clients who were referred to your agency and have been accepted into your project by completing enrollment in the system.

Denied:
This tab lists all clients who were referred to your agency and whose referrals you have denied in the system.

Sent:
This tab shows the clients your agency has referred. ***You will never need to work in this tab.***

Daily Attendance Transactions

If your agency provides services on a day-by-day basis, allowing a large number of clients to be checked in for services very quickly, you may find an 'Attendance' option from the main menu.



If you need this feature enabled, please contact the **HMIS Lead/Administrator** for setup.

To mark a client's daily attendance:

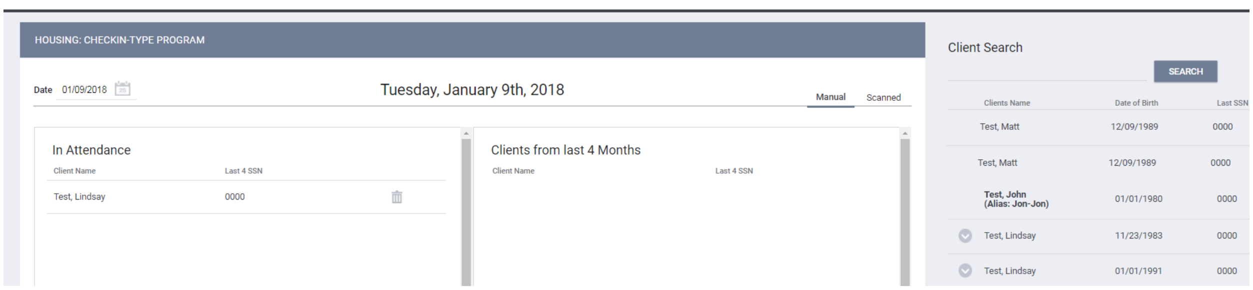
1. Select the **Attendance** option, then choose the appropriate **service name**.
2. The **Attendance Screen** will display a list of clients already marked as present (note: clients must be enrolled in the service before they can be marked present).
3. By default, you will be brought to the **current date**, but you can use the **calendar** in the upper-left corner to view or update attendance for other dates.

If you'd like to mark a client's daily attendance, **select this option and then the appropriate service name.**

The Attendance Screen shows you who has already been marked in attendance (you can be marked as in attendance after being enrolled into the service).

You will automatically be brought to the current date, but you can use the date picker in the upper-left hand corner to switch dates.

Add an attendee from a list of recent attendees from the last four months or from the side panel/client search.



<u>Managing Service Attendance</u>

To **remove an attendee**, click the **Trash Can** icon to the right of the client's name.

The **Service Attendance** screen is divided into three sections:

1. **In Attendance** (left side):
   This box shows the clients who have received the service on the selected date.

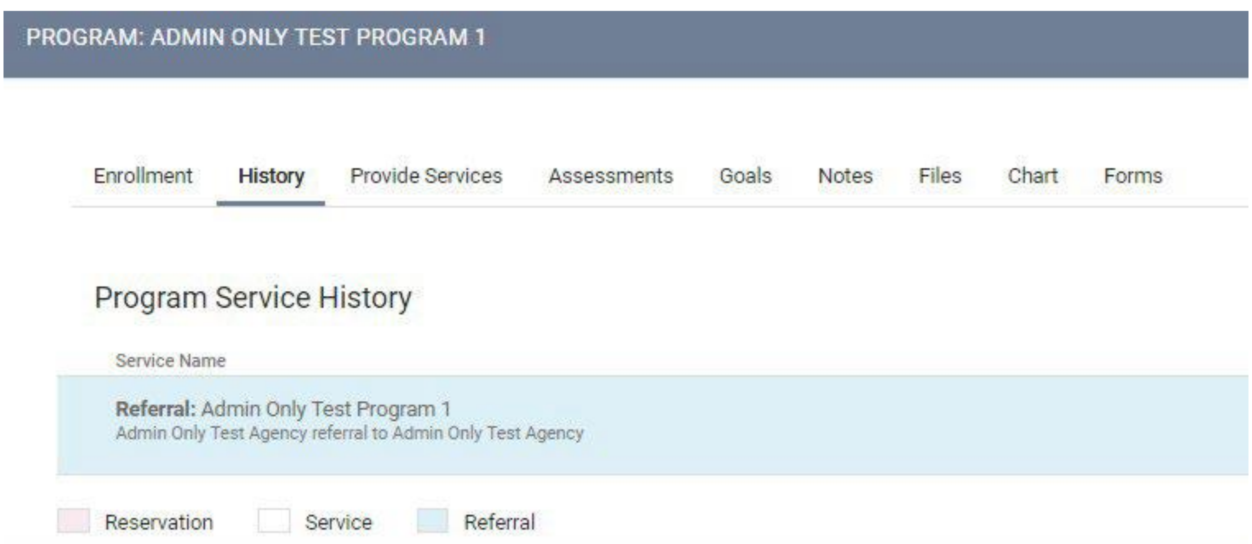
2. **Recent Service Recipients** (middle):
   This is a list of clients who have received the service within the past 4 months.
3. **Client Search** (far right):
   Use this search box to find clients who have *not* received the service in the past 4 months.
   - Enter the full or partial name to search.
   - You can also manage **household attendance** from this section.

Note:
If a client does not appear in the search results, they likely do not exist in HMIS. Please follow the "**Adding a Client**" steps to create their record before attempting to add them to attendance.

Additionally, you can manage attendance from within a client's **Service History** by navigating to the **Attendance** section of their service screen.

Program Tab Overview

After selecting a client's enrollment into a particular program, you will have a number of options to view the service and enrollment history, as well as provide services for your client within that program.



Program Enrollment Tabs Overview

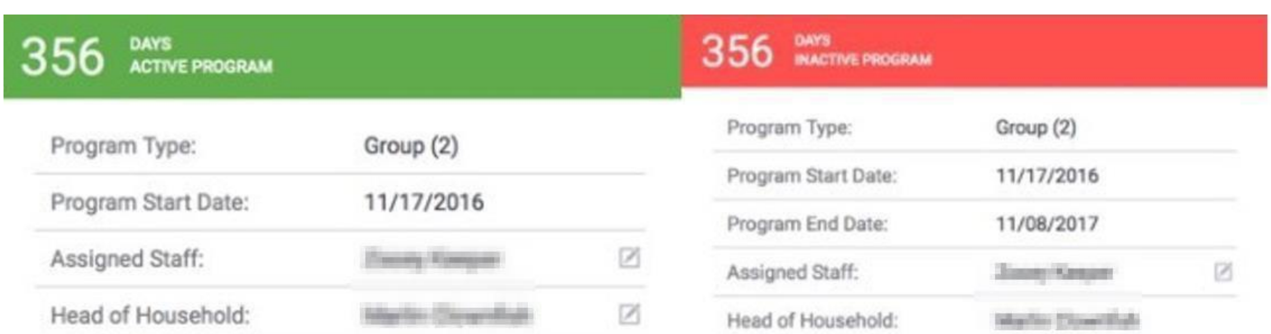
- **Enrollment**
  Opens the enrollment screen, which should be completed at the time of client entry into the program.
- **History**
  Displays the client's service history specific to this program.
- **Provide Services**
  Allows you to assign or record services associated with the program.
- **Files**
  Lets you upload forms and documents that are **only visible to your agency**.
  Do NOT use this section to upload files related to Coordinated Entry.
- **Notes**
  Enables you to enter case notes that are **only visible to your agency**.
- **Exit**
  Opens the exit screen to complete documentation when the client leaves the program.

Program Status Box

The **Program Status** box displays key information about the client's enrollment, including:

- **Current Status** – Indicates whether the enrollment is *Active* or *Inactive*
- **Program Type** – The category or model of the program
- **Program Start Date** – The date the client began enrollment
- **Assigned Staff** – The staff member currently assigned to the client
- **Head of Household** – Identifies the designated head of household

It also includes a **list of current household members**, with options to **add new members** or **edit existing ones**.

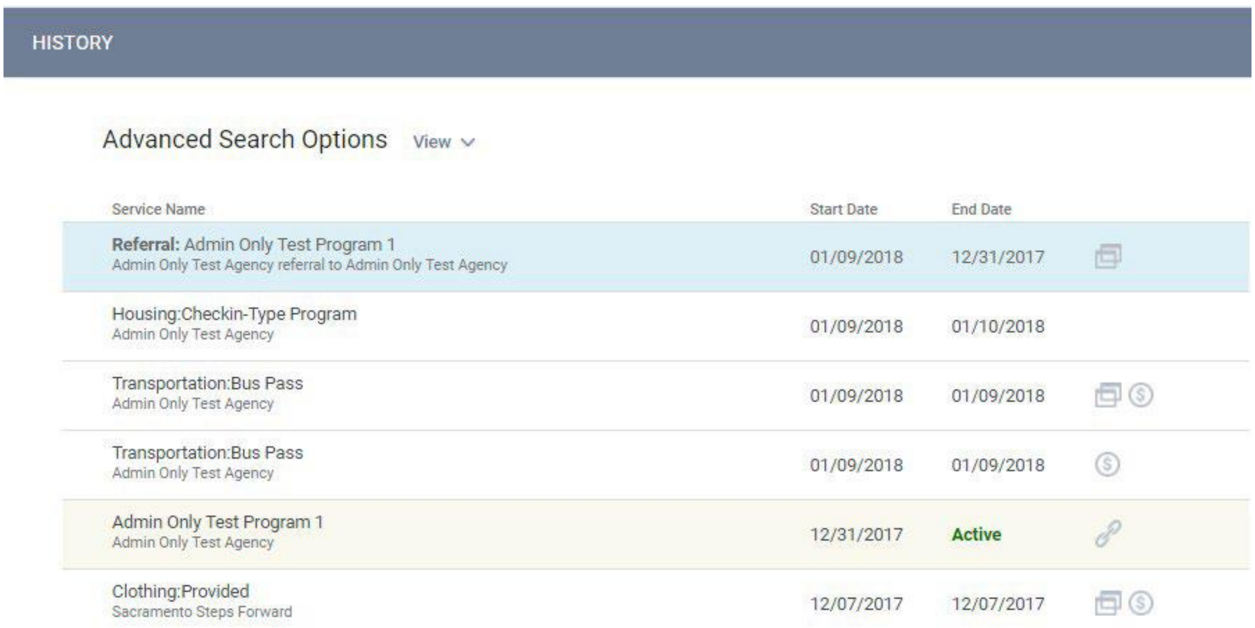


History Screen Overview

The **History** screen provides a **color-coded view** of your client's:

- Services
- Programs
- Assessments
- Referrals

This screen offers a quick and easy way to review, locate, and select any of these past activities for further action or review.



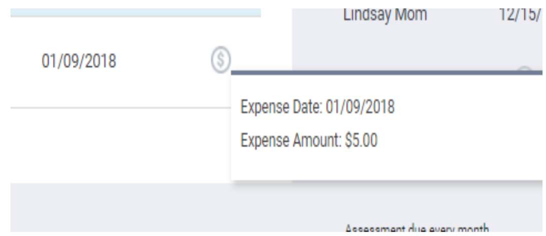
Program History Section Overview

The **Program History** section provides detailed information about a client's program enrollments. Many of these details also appear in the **History** tab. Key elements include:

- **Program/Agency**: Displays the name of the program and the agency associated with the enrollment.
- **Start/End Dates**: Shows the Program Entry Date and, if applicable, the Program Exit Date. If the client is still enrolled, the End Date will display as **"Active."**

- **Referral Placement**: If the enrollment resulted from a referral, a **chain link icon** will appear to the right. Hovering over the icon reveals the **referring agency's name** and the **date of referral**.
- **Program Type**: Indicates the type of program the client is enrolled in.
- **Primary Agency**: If the enrollment was created by a staff member acting under a different agency profile, an **image icon (e.g., image2.png)** will display. Clicking it will show the staff member's **primary agency**.
- **Type**: Indicates whether the client was enrolled **individually** or as part of a **household group**.

<u>**Managing Service Transactions with Expenses**</u>



- **$ Icon**:
  Service transactions that include attached expenses are marked with a **$ icon** on the right side of the listing.
  - Hover over the icon to view **additional financial details**, including the **total expense amount** and the **funding source** used.
- **Advanced Search**:
  If the client has a long service history spanning multiple pages, use the **"Show Advanced Search Options"** feature to efficiently narrow down results.
- **Editing Services**:
  Click the **Edit** option to the left of a service name to:
  - Add service notes
  - Adjust service dates
  - Add or modify expenses
  - Add household members

All these actions can be performed directly within the **Program Management** screens.

Client Contact Tab

<u>**Client Record – Contact Tab Overview**</u>

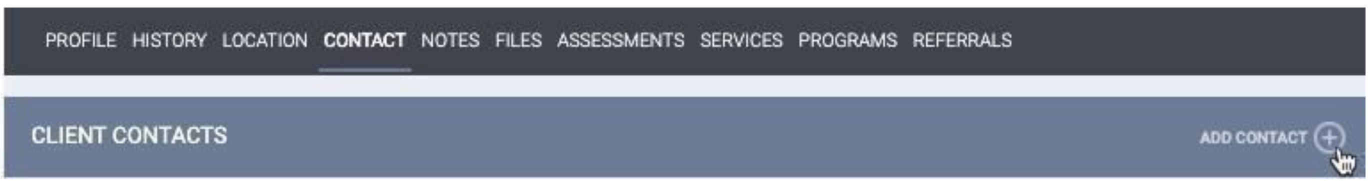
The **Contact** tab within a client record is used to store and share contact information such as phone numbers and email addresses. You can create multiple contact records to save details for family members, case workers, employers, and other important contacts.

Depending on your agency's sharing settings and your access role, contact information can be:

- Shared, edited, or deleted internally within your agency
- Shared, edited, or deleted across agencies
- Made private to your agency regardless of sharing settings

To create a new contact record:

1. Open the client record and select the **Contact** tab.
2. Click **Add Contact**.



Client Location Tab

Whenever you add client location data, an **Add Location** pop-up will appear. You can either:

- Manually search for the location, or
- Use your device's current location to autofill the information.