

SANTA BARBARA COUNTY CONTINUUM OF CARE

Homeless Management Information System



one
COUNTY
one
FUTURE

COUNTY of SANTA BARBARA
HOUSING &
COMMUNITY DEVELOPMENT

January 2025

Updating Clients in HMIS

Table of Contents

3	HMIS Workflow Overview: Updating & Exiting
4	Access HMIS
	Updating a Client's File
5	Access Enrollment
6	Provide Services: Add one or more services
8	Add Assessments
10	Add Housing Move-In Date
11	Add Notes
12	Add Files
13	Update Contact
14	Update Location
	Client Exit
15	Program Exit
17	Add ROI*
	* This step is optional if ROI already on file for the client

| HMIS Workflow Overview: Updating & Exiting

Client Search

Search for client by first name, last name, date of birth, social security number, or any combination of these. **You can also search for a client by their WellSky (previous HMIS) client ID**

Best Practice: If the client is in a household, search for the head of household.

After accessing the client's Profile page:

Updating the Client's File

1. Click **Programs** tab
2. In **Program History**: Click the pencil icon of the program to enter new data on the client, **THEN**
3. Click **Provide Services** to add service(s)
4. Click **Assessments** to add a new assessment or to review completed assessment(s)
5. Click **Notes** to enter a new case note or to view existing notes
6. Click **Files** to upload a document or to view documents already uploaded

From the Toolbar (top of page):

7. Click **Programs** to enroll in a new program.
8. Click **Contact** to add or edit contact information.
9. Click **Location** to add or edit the client's location.

Exit the Client

1. Click the **Programs** tab
2. In **Program History**: Click the pencil icon of the program the client will be exiting
3. **Did the client or household move into permanent housing?** Enter the move-in date in **Housing Move-In Date**
4. Click **Exit**
5. Enter exit data
6. Click **Save & Close**

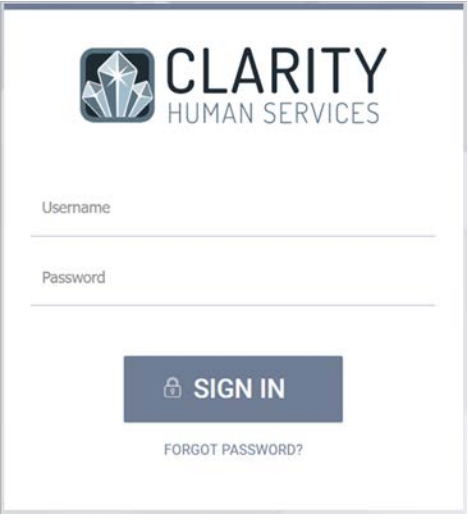
Greater detail and screenshots on how to **Update a client's file** [begins on page 5](#)

Greater detail and screenshots on how to **Exit a client** [begins on page 15](#)

| Access HMIS

Link to HMIS site: <https://santabarbara.clarityhs.com/login>

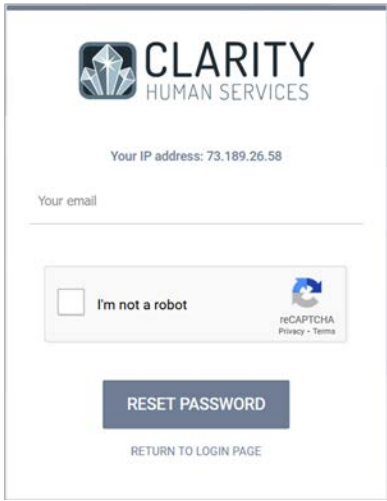
Enter your **Username** and **Password**.
Click **Sign In**.



The login page features the Clarity Human Services logo at the top. Below the logo are two input fields labeled 'Username' and 'Password'. A blue 'SIGN IN' button with a lock icon is centered below the fields. A link for 'FORGOT PASSWORD?' is located at the bottom of the page.

Forgot Password?

- Click **Forgot Password?**
- Enter in your email address.
- Click **I'm not a robot box**.
- Click **Reset Password**.



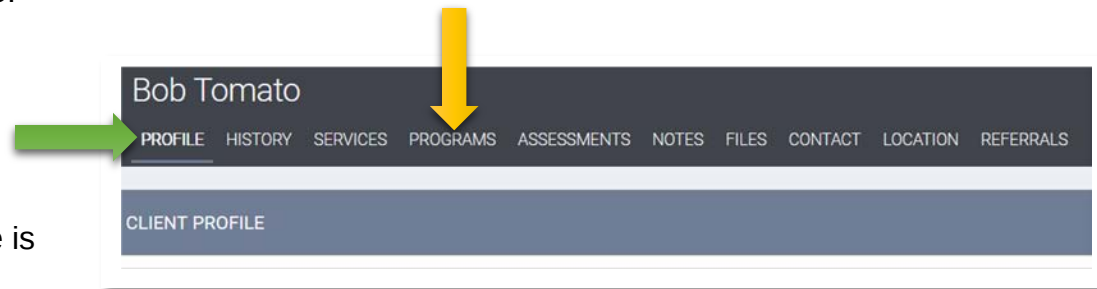
The forgot password page displays the Clarity Human Services logo. It shows the user's IP address as '73.189.26.58'. Below this is an input field for 'Your email'. A reCAPTCHA box with the text 'I'm not a robot' and a checkbox is present. A blue 'RESET PASSWORD' button is centered below the reCAPTCHA. A link for 'RETURN TO LOGIN PAGE' is at the bottom.

| Update Client File: Access the Enrollment

Data entered about the client at enrollment details what life looked like for the client at enrollment. As life changes for the client, those changes are recorded in HMIS.

To update a client's file

- Search for the client
- Click on the client's name
- The client's **Profile** page displays
- Immediately below the client's name is the Toolbar (green arrow)



Use the Toolbar (green arrow) to:

- **History:** Click to view services provided
- **Programs** (yellow arrow): Click to view the client's enrollment(s), or to enroll the client in a new program
- **Contact:** View, edit, or add contact data
- **Location:** View, edit, or add location data

To add Services, Assessments, Notes, or Files:

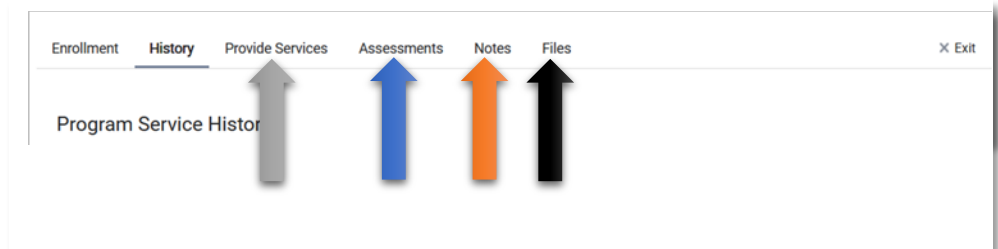
- Click Programs (yellow arrow)
- Scroll over the program you want to access in Program History. The pencil icon will appear
- Click the pencil to the left of the program
- The Program toolbar will display (see below)

Click **Provide Services** (grey arrow) to add a service

Click **Assessments** (blue arrow) to access assessments in order to update the client's file

Click **Notes** (orange arrow) to add a note

Click **Files** (black arrow) to upload files

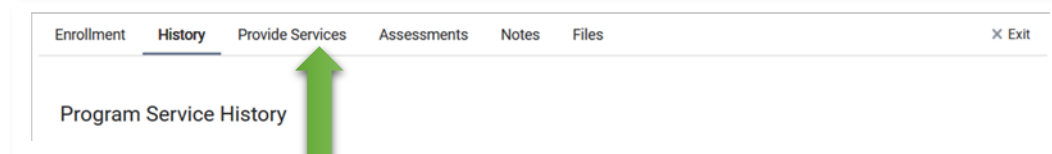


| Update Client File: Services

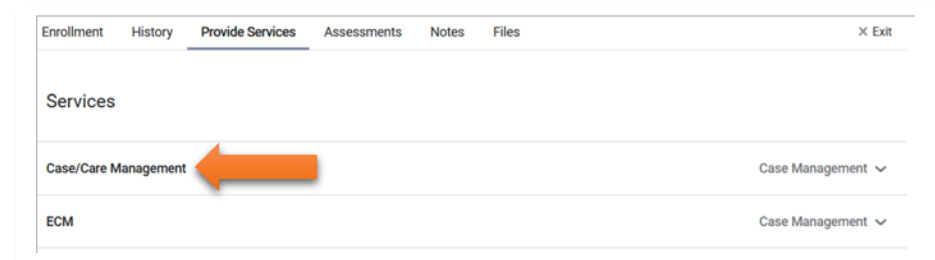
To add one or more Services:

- Click **Provide Services** (green arrow)
- A list of services will display under **Services**. What services display will depend upon how the program was configured
- Locate the service to provide. Click on the service. In this example, **Case Management** selected (orange arrow)
- **Event Date:** defaults to today's date. Change if necessary
- **Service Note:** Enter text
- Click **Submit**
- Page will refresh and return to the **Provide Services** screen

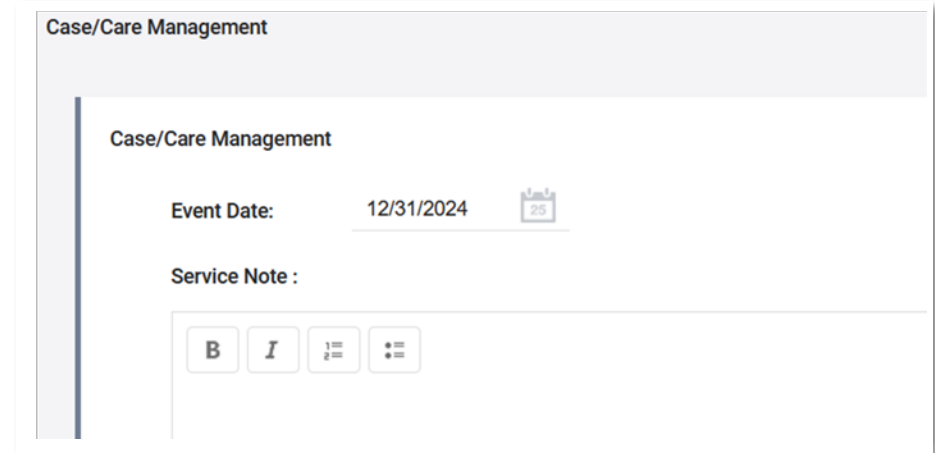
Not all services listed when you click on Provide Services? Go to Santa Barbara HMIS, click Help, then submit a request. Your request for additional service(s) will be forwarded to the County



The screenshot shows the top navigation bar with tabs: Enrollment, History, Provide Services, Assessments, Notes, and Files. The 'Provide Services' tab is highlighted with a green arrow pointing to it. Below the tabs, the text 'Program Service History' is visible.



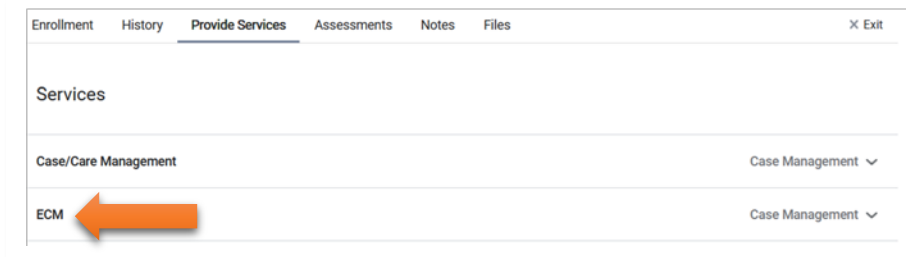
The screenshot shows the 'Provide Services' tab selected. Under the 'Services' heading, there is a list of services. 'Case/Care Management' is selected, indicated by an orange arrow. To the right of the service name is a dropdown menu showing 'Case Management' with a downward arrow. Below it, 'ECM' is also listed with a similar dropdown menu.



The screenshot shows the 'Case/Care Management' form. It has a title bar 'Case/Care Management'. Below it, there is a section for 'Case/Care Management' with two main fields: 'Event Date:' and 'Service Note:'. The 'Event Date:' field is set to '12/31/2024' and has a calendar icon. The 'Service Note:' field is empty. At the bottom of the form, there are four buttons: 'B', 'I', '1 2 3', and a button with a plus sign and three dots.

| Update Client File: Services

In some cases, selecting a service will reveal two or more subcategories. For example, selecting **ECM** (orange arrow) reveals 2 subcategories:



Click on the subcategory service you want to add

Enter data, then click **Submit**

Page will refresh and return to the **Provide Services** screen

Some services only require a start date and a note. Other services may include tracking the amount of time spent providing the service, or a dollar amount, funding source, etc.

| Update Client File: Assessments

To enter an assessment:

- Access the client's file
- Click **Programs**
- Click the pencil icon on the enrollment you want to update
- Click **Assessments** (green arrow)

Available Assessments will display:

- **Current Living Situation:**
Select if the client's living situation has changed
- **Status Update Assessment:**
Select when there is a change in the client's life, and they are still enrolled in your program
- **Annual Assessment:** Select if client has been enrolled in your program for 1 year

To complete an Assessment:

- Click **Start**
- If the client is in a household: member name(s) will display. To include a household member: click the toggle to turn it blue
- Click **Add**
- The Assessment will display
- Enter text
- Click **Save & Close** (if client single), or **Save & Next** (if client is in a household. Once data entered for all members, click **Save & Close**

| Update Client File: Assessments

In this example **Status Update Assessment** was selected. Selecting Status Update Assessment gives you the option of updating **Disabilities**, **Monthly Income**, **Non-Cash Benefits**, and **Health Insurance**.

At enrollment the client's **Earned Income** was \$750/mo (green arrow).

To change the Earned Income amount: simply enter the new amount in **Amount** (blue arrow). To do that:

- Scroll over 750.00 to highlight
- Enter new amount

To add a new Income from Any Source:

- Locate the new income source
- Click the toggle to turn it blue indicating and active source
- Enter the amount

Follow these same general guidelines for **Disabilities**, **Non-Cash Benefits**, and **Health Insurance**.

There is no need to enter an end date on an existing Disability, Monthly Income, Non-Cash or Health Insurance entry. Simply enter the new data.

MONTHLY INCOME AND SOURCES	
Income from Any Source	Yes
Earned Income	Amount 750.00
Unemployment Insurance	☐
Supplemental Security Income (SSI)	☐
Social Security Disability Insurance (SSDI)	☐
VA Service-Connected Disability Compensation	☐
VA Non-Service Connected Disability Pension	☐
Private Disability Insurance	☐
Worker's Compensation	☐
Temporary Assistance for Needy Families (TANF)	☐
General Assistance (GA)	☐
Retirement Income from Social Security	☐
Pension or Retirement Income from a Former Job	☐
Child Support	☐
Alimony and Other Spousal Support	☐
Other Income Source	☐
Total Monthly Income for Individual	750.00

| Update Client File: Housing Move-In Date

You may see this message display:

 If the client/household has been permanently housed, please update the Housing Move-In Date field on the enrollment screen with the date the client/household moved into the permanent unit.

If client or household has moved into permanent housing:

- Access the client's file
- **If client is in a household**, select the Head of Household's file
- Click **Programs**
- Click the pencil icon on the enrollment you want to update (blue arrow)
- Click **Enrollment** (black arrow).
- **Locate Housing Move-in Date** (orange arrow)
- Enter date
- Click **Save & Close**.

PROGRAM HISTORY

Program Name

NBCC-Mid County-RRH-CERF

PH - Rapid Re-Housing

New Beginnings Counseling Center ⓘ

Enrollment History Provide Services Assessments Notes Files Chart

Enroll Program for client Bob Tomato

Project Start Date 10/17/2023 

TRANSLATION ASSISTANCE NEEDED

Translation Assistance Needed No 

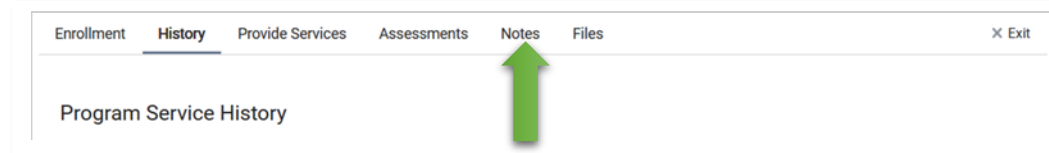
COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date 

| Update Client Files: Notes

To add one or more Notes:

- Access the client's **Profile** page
- Click **Programs**, then click pencil to left of the program you want to update
- Click **Notes** (green arrow)



To add a Note:

- Click **Add Note**
- **Client Notes** display
- **Title:** enter a title
- **Category:** select best match
- **Agency:** defaults to your agency
- **Date:** Change if needed
- **Time Tracking** (optional): Select hours & minutes.
- **Note:** enter note

The screenshot shows the 'CLIENT NOTES' form. It has a title field, a category dropdown menu (currently showing 'Select'), an agency dropdown menu (currently showing 'Merced County BHRS'), a date field (currently showing '11/03/2023'), a time tracking section with a calendar icon and a dropdown menu (currently showing 'Time Tracking'), and a note text area with formatting options (B, I, U, and a list icon).

Below the **Note** section, is Private.

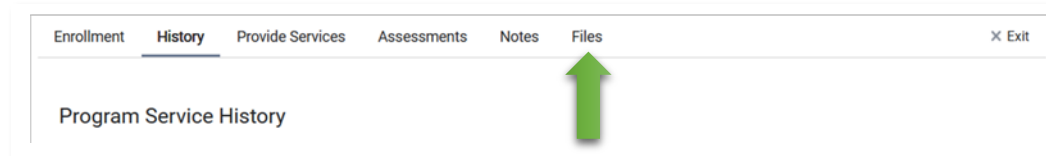
- **To make the note private:** click the toggle (black arrow) it will turn blue
- Note is now private
- Click **Add Record**



| Update Client Files: Files

To add one or more Files:

- Search for and access the client's **Profile** page
- Click **Programs**
- Click pencil to left of the program you want to update
- Click **Files** (green arrow)



To add a file (document):

- Click **Add File**.
- **Category**: select best match
- **Name**: select best match
- **Select File**: click to select file from your computer
- **Private**: click on the toggle to make private
- Click **Add Record**

UPLOAD A FILE

Category

Family, Social and Legal

Name

Alimony Agreement

File

Select File

Private

Trouble attaching files? Switch to the Basic Uploader

ADD RECORD

CANCEL

What is Link From Files?

A document you are unloading may have already been uploaded by someone else. If that document has been uploaded, you can link to that document.

Click **Link From Files** to see if what, if any, documents have already been uploaded.

| Update Client Files: Contact

Access the client's **Profile** page, then click **Contact** (green arrow).

- **Contact** page displays
- Enter data such as email, and phone number
- **Note:** this is an optional data field.
- Click **Save Changes**



Need to update an existing contact?

- Click pencil to left of **Client** (blue arrow)
- Update data as needed
- Click **Save Changes**

Contact Type	Name	Phone	Email	Date
Client	Bob Tomato	209-222-3333	testclient@testclient.org	10/03/2023

Optional: Contact data can be set to **Private**

- **Private:** Click the Toggle (orange arrow)
- The toggle will turn blue
- Click **Save Changes**

Contact Type	Client
Email	testclient@testclient.org
Phone (#1)	209-222-3333
Phone (#2)	XXX-XXX-XXXX
Active Contact	☒
Private	☐
Contact Date	10/03/2023

| Update Client Files: Location

Access the client's **Profile** page, then click **Location** (green arrow)

- **Location** page displays
- **Address Type**: select best match
- **Name**: enter name for address
- **Location Date**: enter date
- **Note**: optional.
- Click **Save Changes**



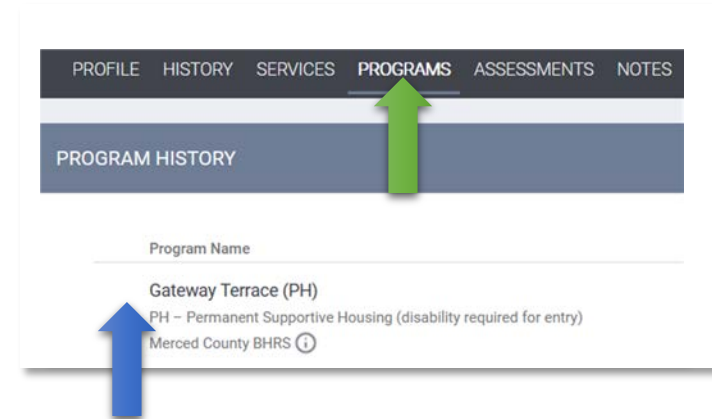
A map will display which you can zoom in and out of. Below the map the client's address will display, along with the person who entered the data.

Optional: Location data can be set to **Private**.

Client Exit

When it is time to exit the client (or the household) from a program:

- Access the client's **Profile** page
- **If in a household:** Access the head of household's **Profile**.
- Click **Programs** (green arrow)
- Click pencil to left of program's name to begin the exit (blue arrow)
- Information on that program will display
- Click Exit on the program toolbar (orange arrow)
- If client is in a household, the members of that household will display.
- To include all members, click the toggle (black arrow)
- The toggle should be blue for each member you wish to include
- Click **End Program**



PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES

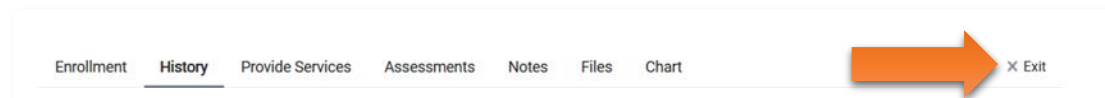
PROGRAM HISTORY

Program Name

Gateway Terrace (PH)

PH – Permanent Supportive Housing (disability required for entry)

Merced County BHRS ⓘ



Enrollment History Provide Services Assessments Notes Files Chart X Exit



SELECT CLIENTS TO EXIT FROM PROGRAM

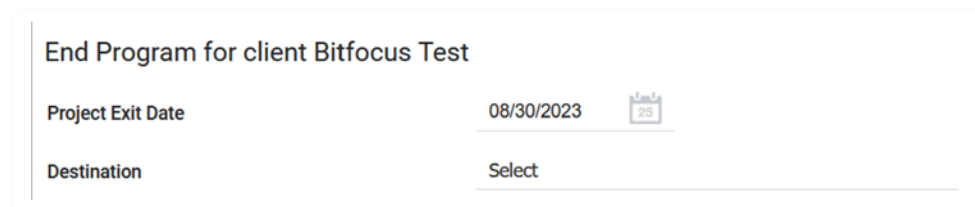
☒ Bob Tomato Father

☐ Green Tomato Son

END PROGRAM

The End Program for client page displays:

- **Project Exit Date:** defaults to today's date. Change if needed
- **Destination:** select best match



End Program for client Bitfocus Test

Project Exit Date 08/30/2023

Destination Select

| Client Exit

Review the remaining data fields. Update any field as need. If the client is single, you will be prompted to click **Save & Close**.

If the client is in a household, you will be prompted to select **Save & Next**.

If in a household, the next member of the household will display.

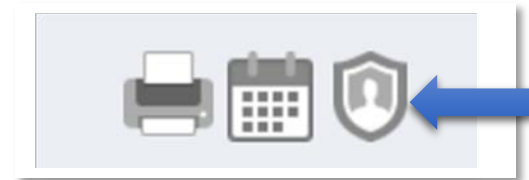
- Exit date will default to the exit date entered for the head of household
- Destination: select best match for this member of the household
- Review other data fields on page. Update as needed
- If **Save & Next** displays. Click to proceed to next member
- Repeat this process until all members have been
- Click **Save & Close**

| Update ROI

The ROI in Clarity is universal. Meaning, once one Agency enters a ROI for a client, that ROI is valid for all Agencies and Programs. There is no need for you to enter an additional ROI.

Your Agency may want you to enter a ROI even if there is already a ROI on file for the client. **Here are the steps to add an ROI for a client who already has a ROI on file:**

- Access the client's file
- Look to the right of the page. Click the **Security** icon (blue arrow)
- The ROI page will display



In this example, an Agency has added the ROI and it is valid through December 2027 (green arrow)

If you want to add your Agency's ROI:

- Click Files (orange arrow)
- Click Add File
- **Category:** select **Family, Social and Legal**
- **Predefined Name:** select **Other**
- Click **Select File**, then select file from your computer
- Click **Add Record**

Permission	Type	Start Date	End Date
Yes	Verbal Consent	12/18/2024	12/17/2027