SANTA BARBARA COUNTY CONTINUUM OF CARE

Homeless Management Information System

COUNTY of SANTA BARBARA
HOUSING & COMMUNITY DEVELOPMENT

January 2025

Updating Clients in HMIS

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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 existing
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

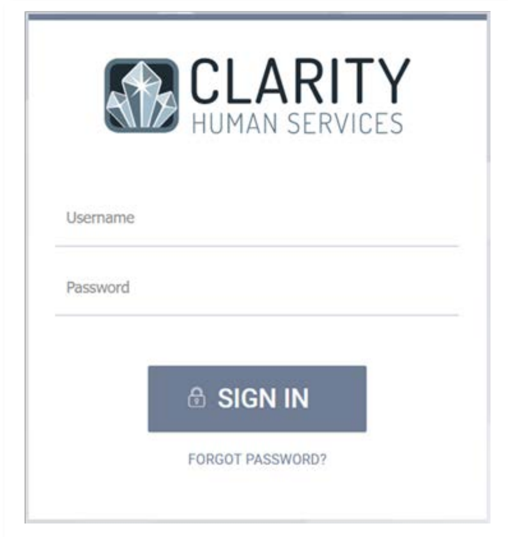
Greater detail and screenshots on how to **Exit a client** begins on page **15**

Access HMIS

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

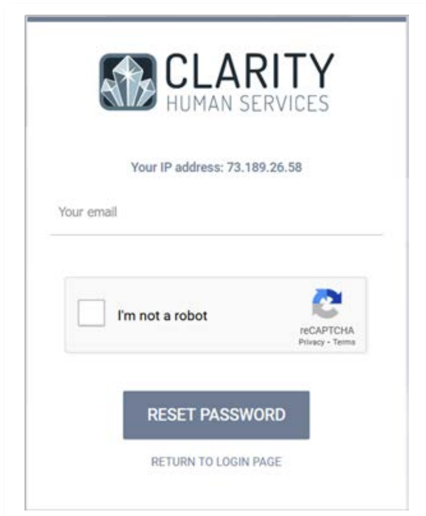
Enter your **Username** and **Password**.

Click **Sign In**.



Forgot Password?

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

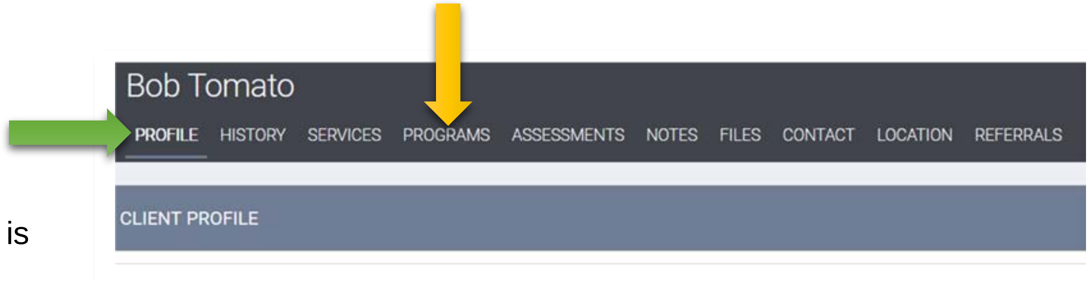


Update Client File: Access the Enrollment

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**__**:**

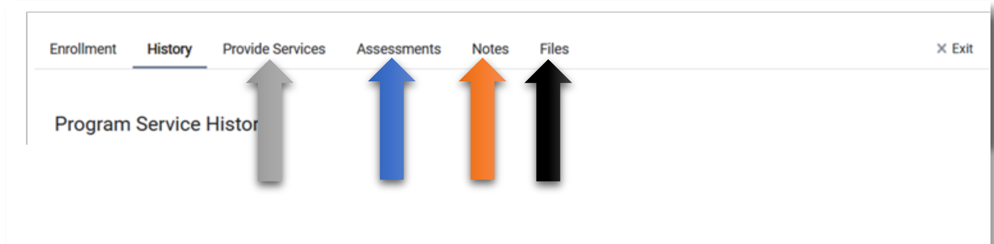
- Click Programs (yellow arrow)
- Scroll over the program you want to access in Program History. The pencil icon will appear
- Click the pencil to the left of the program
- The Program toolbar will display (see below)

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

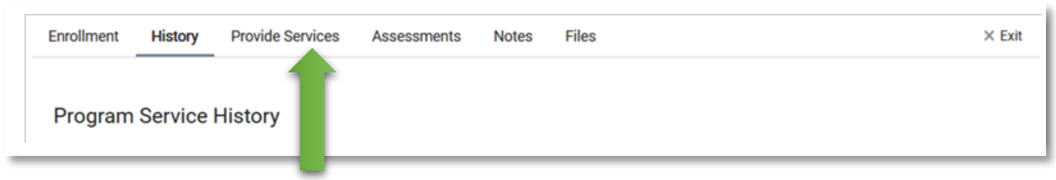
Click **Files** (black arrow) to upload files



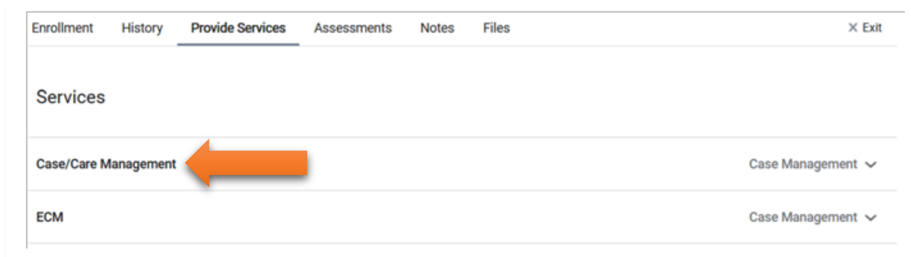
Update Client File: Services

To add one or more Services:

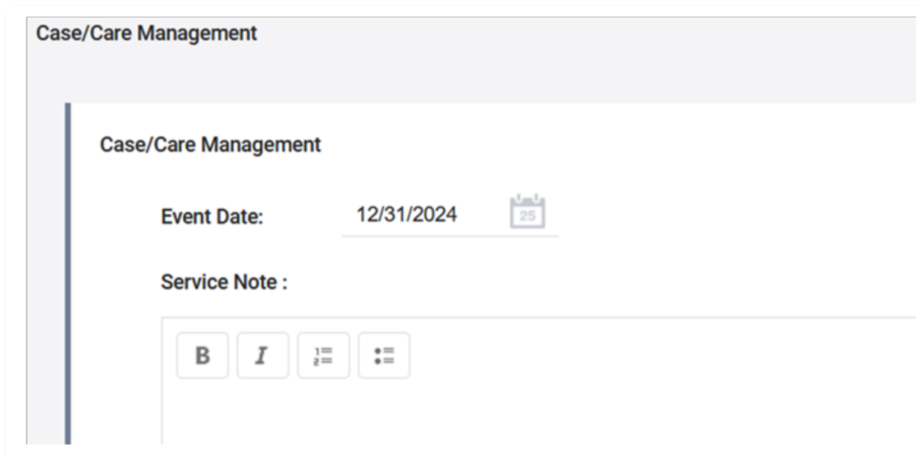
- Click **Provide Services** (green arrow)
- A list of services will display under **Services**. What services display will depend upon how the program was configured



- Locate the service to provide. Click on the service. In this example, **Case Management** selected (orange arrow)



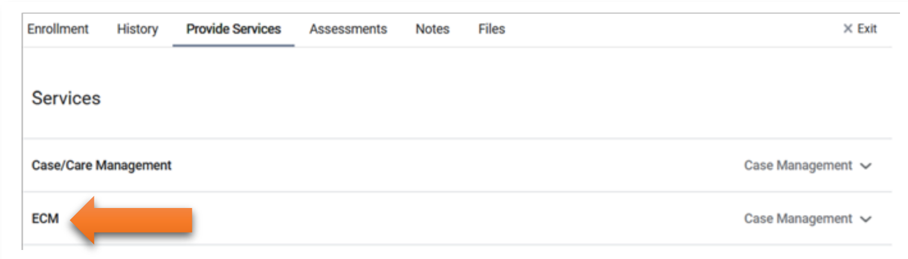
- **Event Date**: defaults to today's date. Change if necessary
- **Service Note**: Enter text
- Click **Submit**
- Page will refresh and return to the **Provide Services** screen

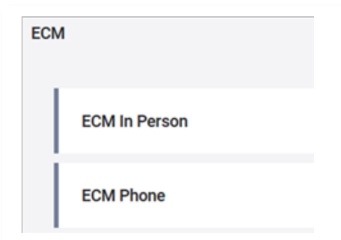


Not all services listed when you click on Provide Services? Go to Santa Barbara HMIS, click Help, then submit a request. Your request for additional service(s) will be forwarded to the County

Update Client File: Services

In some cases, selected 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**

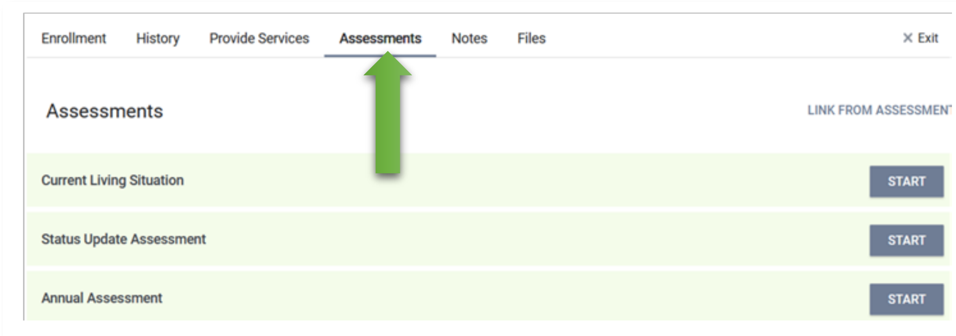
Page will refresh and return to the **Provide Services** screen

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**.

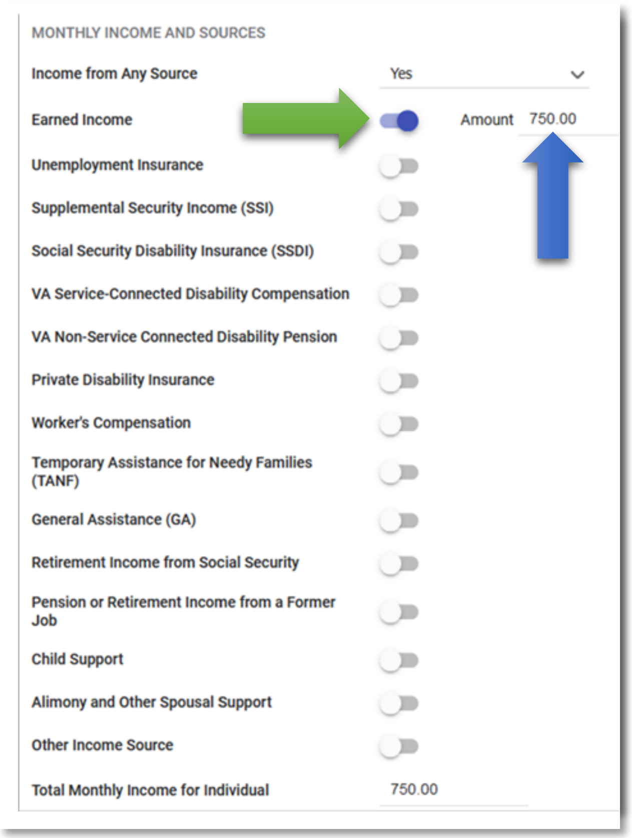
At enrollment the client's **Earned Income** was $750/mo (green arrow).

<u>To change the Earned Income amount</u>: simply enter the new amount in **Amoun**t (blue arrow). To do that:

- Scroll over 750.00 to highlight
- Enter new amount

<u>To add a new Income from Any Source</u>:

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

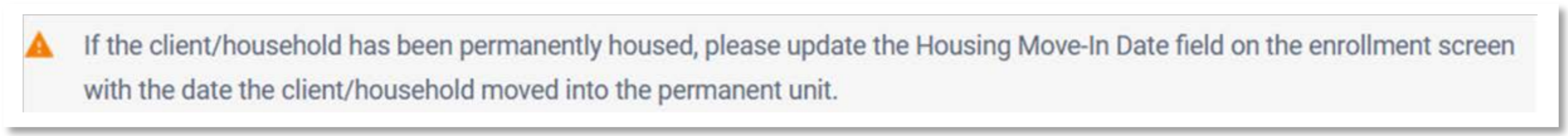


Follow these same general guidelines for **Disabilities**, **Non-Cash Benefits**, and **Health Insurance**.

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.

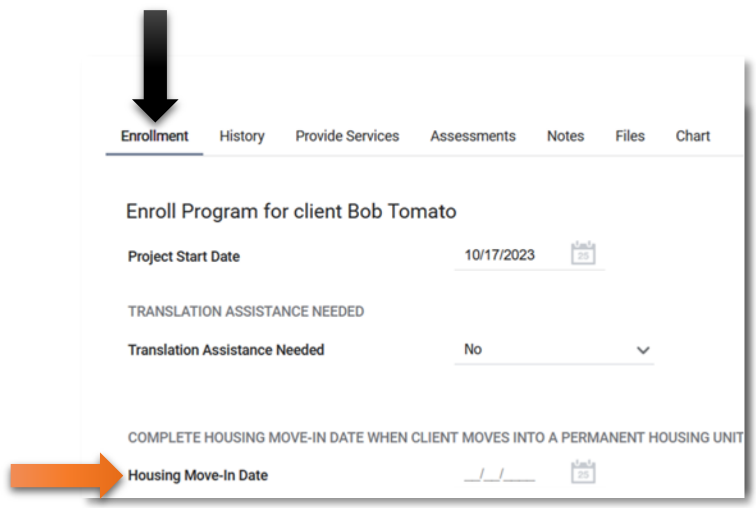
Update Client File: Housing Move-In Date

You may see this message display:



<u>If client or household has moved into permanent housing</u>:

- Access the client's file
- **<u>If client is in a household</u>**, select the Head of Household's file
- Click **Programs**
- Click the pencil icon on the enrollment you want to update (blue arrow)

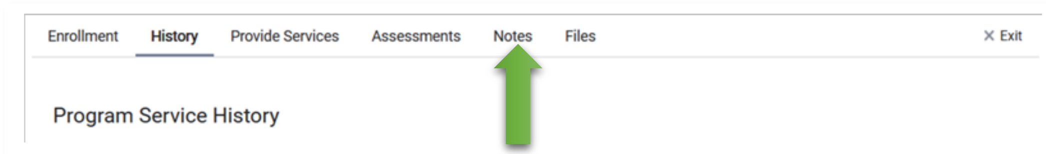


- Click **Enrollment** (black arrow).
- **Locate Housing Move-in Date** (orange arrow)
- Enter date
- Click **Save & & Close**.

Update Client Files: Notes

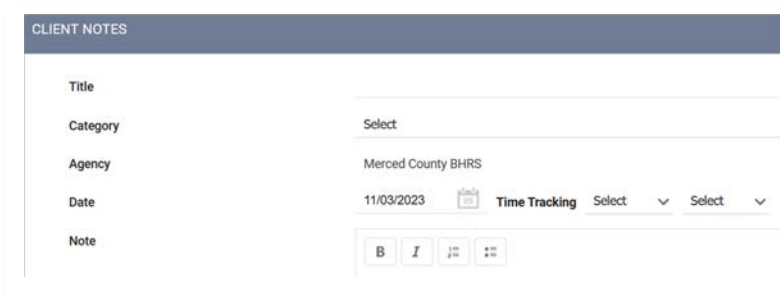
<u>To add one or more Notes</u>:

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



<u>To add a Note</u>:

- 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



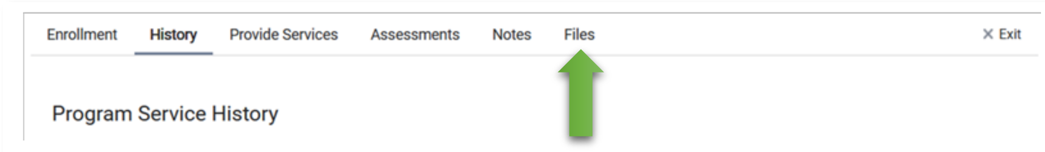
Below the **Note** section, is Private.

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

Update Client Files: Files

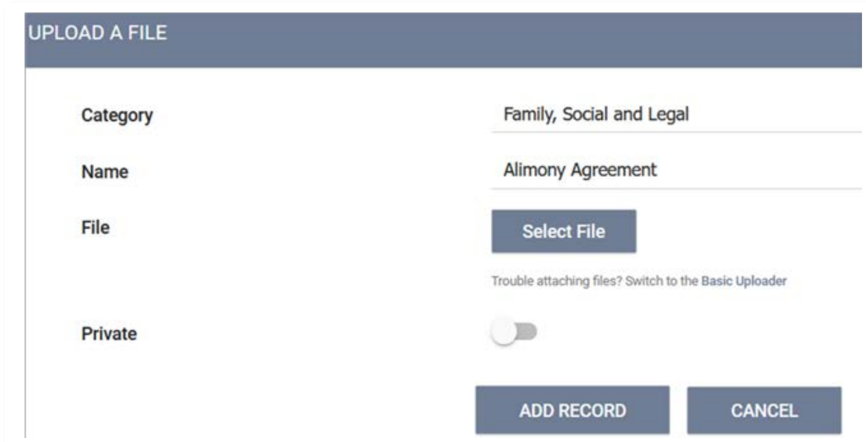
To add one or more Files:

- 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):

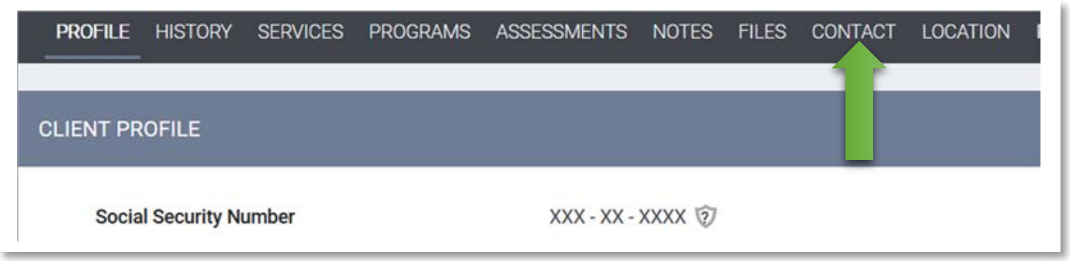
- Click **Add File.**
- **Category**: select best match
- **Name**: select best match
- **Select File**: click to select file from your computer
- **Private**: click on the toggle to make private
- Click **Add Record**



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

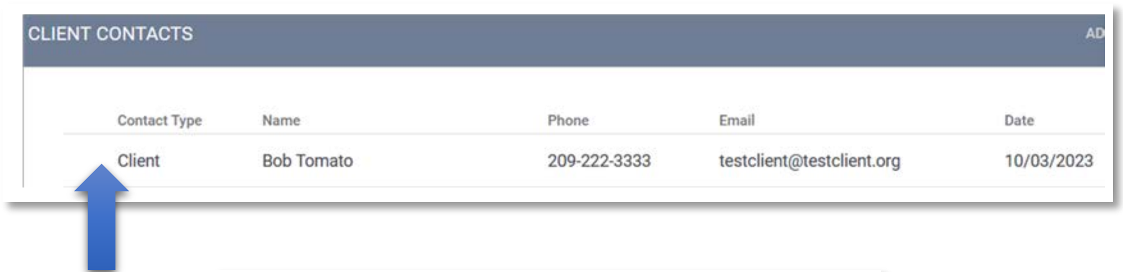


Access the client's **Profile** page, then click **Contact** (green arrow).

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

<u>Need to update an existing contact</u>?

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



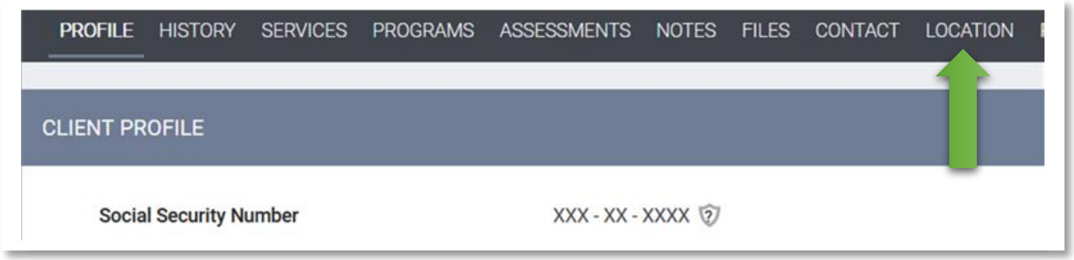
Optional: Contact data can be set to **Private**

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

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**



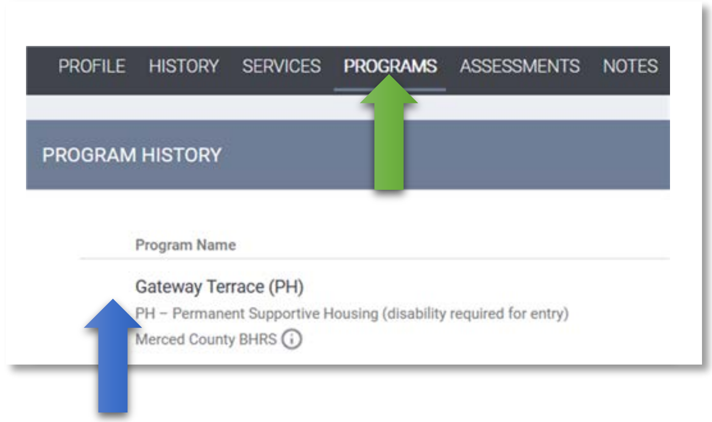
A map will display which you can zoom in and out of. Below the map the client's address will display, along with the person who entered the data.

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

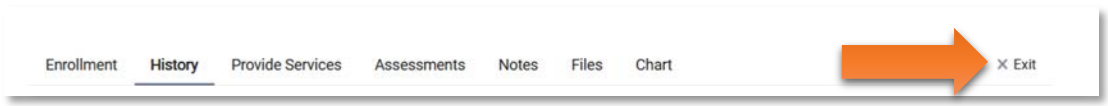
Client Exit

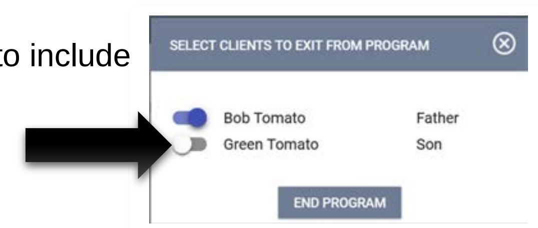
When it is time to exit the client (or the household) from a program:

- Access the client's **Profile** page
- **<u>If in a household</u>**: 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



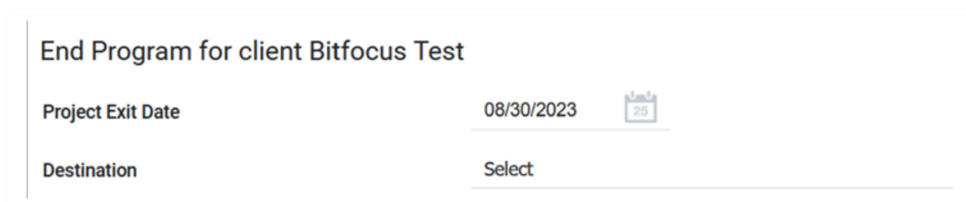
- Click Exit on the program toolbar (orange arrow)
- If client is in a household, the members of that household will display.
- To include all members, click the toggle (black arrow)
- The toggle should be blue for each member you wish to include
- Click **End Program**





The End Program for client page displays:

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



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**.

<u>If in a household, the next member of the household will display</u>.

- 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)

<u>If you want to add your Agency's ROI</u>:

- 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**