OHIO Balance of State Continuum of Care

# HMIS Transition Webinar Series

## August 11, 2021
## Questions and Answers

| Question Asked | Answer Given |
|---|---|
| If a client leaves shelter, will Clarity automatically exit them or how do we exit them? | You are still responsible for exiting clients from shelter by clicking exit in the upper right hand corner of the program screen. |
| How do we exit a client when they leave shelter, especially if not going into permanent housing? | You exit a client using the Exit link in the upper right corner of the Program screen. The font is small and blue and it's somewhat hard to find. |
| Is there a "due by" date for back data? | No |
| What is AP? | AP = Access Point |
| Just to be clear....how do we access AP? I entered clients through SEARCH....did I do it wrong? | You access your AP provider by clicking the dropdown next to your agency under your name and switching to the Coordinated Entry agency. If you entered clients under another agency you do not have to go back and change anything but enter new clients under Coordinated Entry going forward. |
| Will we still be able to get client counts in R minor, or do we need to find it in Clarity? | You will be able to continue to get client counts from R minor elevated when it is up and running, hopefully next month. In the meantime, you can use the Program Roster report in Clarity under Reports>Program Based Reports. Be advised that this report has PII that must be stripped before sharing the report and that it must be saved securely. |
| Where do we find our APR in clarity? | https://get.clarityhs.help/hc/en-us/articles/115013295968--HUDX-227-Annual-Performance-Report |
| For Permanent Housing Track, do we leave it blank for HP clients? | Yes, permanent housing track is only applicable for clients who need permanent housing. |
| When will this video be posted so we can rewatch it? | Yes. You can find links to webinar recordings in this series here: http://cohhio.org/boscoc/hmis/ |
| In ServicePoint, I had to send referrals to myself, then go and | Yes, if your agency operates several programs like Access Points and Emergency Shelters, you will continue to refer to your agency's own programs. |

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| accept it, that will still be an option in Clarity? | |
| So for the permanent housing track, do we answer that before we house them or after? In ServicePoint it was supposed to be at entry but then some clients, we didn't know when that date would be. | You should complete permanent housing track as soon as possible after a client accesses the system. |
| So no referrals on any client from July18th to Aug 8th? only add referrals on clients we did intakes on Aug 9th and after? and do we back date those referrals? | That is partially correct, but if a client is still open and in need of PH, then you can add the referral on 8/9 or later. You are not able to backdate referrals |
| So we do not need to "EDA" to the program before we create the client? | In Clarity, it's called "Switching Agencies". The recommended workflow is to begin entry by switching the to correct Agency and then enter the client. This way when you create an enrollment in a program, you are ready to select from the correct program options. |
| Can you demo how to make a household of more than 1 person | This video is available in the eLearning course here: https://cohhio.litmos.com/?C=6153282 |
| How do we add an interim and move in date? | You add what was formerly known as an interim via the Status Assessments feature on the right sidebar inside an enrollment. Move-in date is entered via the Enrollment screen. |
| What about clients that don't come through an AP? | All clients should enter through the APs or a PATH provider. |
| If our program enters clients who are not literally homeless, and not going through AP entry (such as SSO), how do we enter new clients? | All clients should enter through the APs or a PATH provider. When the client is not literally homeless and does not need shelter or permanent housing, the appropriate AP service should be documented. Then the client can be enrolled directly into HP, SSO, or not homeless dedicated. |
| You mentioned that clients served through PATH programs don't have to be entered through APs. What are PATH programs? | PATH stands for Projects for Assistance in Transition from Homelessness. They are funded through Health and Human Services to serve people with serious mental illness who are experiencing homelessness. We have four PATH programs in the BoS (Lorain, Butler, Clermont and Lake counties) and one in Mahoning County. |

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| So we are not a PATH program or an Access Point. We're an ODH program. How do we enter clients? | ODH programs should be receiving clients from their local Access Point. |
| Where there be a new work flow for Path or do I follow the old one? | The workflow for PATH is largely the same although Referrals are documented under a referral service. |
| Case Note for PATH will there be drop down for the type of services? | PATH services and referrals are located in the Provide Services tab inside the Program screen. You are able to add notes to the services. |
| I have not received an email to log into clarity and when I log onto HMIS it is still read only and says service point | If you have not received your Clarity login information please email hmis@cohhio.org. |
| So how will all these changes affect our report in the repository for SSVF? | These changes should have no affect on your SSVF Export. |
| We have clients that stay unsheltered for various reasons. Once in AP, do we skip directly to the VI-SPDAT? | When a client is enrolled in an AP program you should document any services provided as well as complete any necessary assessments, including a VI-SPDAT for unsheltered clients. |
| All services/referrals provided during the blackout period need to be dated 8/9 and after for the enrollments we still need to enter? | Yes |
| When PATH Outreach does a VI-SPDAT do they do it in the CE Program or the Agency Program? | PATH is able to complete assessments and referrals directly from their agency programs. |
| Where do we enter Client Notes? | https://get.clarityhs.help/hc/en-us/articles/115000463848-How-Do-I-Create-Client-Notes- |
| Are Agency Administrators going to be informed whether they have a "looker" license? | Yes. We will email about Looker licenses before Friday, August 20th. |
| I have an APR due next month. I have run the APR in Service Point and downloaded to be put into SAGE. Is that ok? | If the information on your APR in ServicePoint was complete it is fine to use that for your submission.<br><br>The most up-to-date APR can be pulled from Clarity by following these directions: https://get.clarityhs.help/hc/en- |

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| | [us/articles/115013295968--HUDX-227-Annual-Performance-Report](us/articles/115013295968--HUDX-227-Annual-Performance-Report) |
| When will in person trainings resume? | Maybe never. We are building out more e-learning resources now so that we do not have to rely on in-person trainings. We will keep you all updated on ongoing training plans. |
| Where do we enter payment information? | Rental and other types of payments are still entered via the appropriate Service using the Expense Amount field. |
| When I click on any of the tabs, it just shows "no results found" and does not have anything else for me to click on or to add. | You need to be inside a client enrollment for most available tabs to populate. |
| Did I hear you say that for clients who both entered and exited an ES during the blackout, we shouldn't bother entering their stay in Clarity? | That is not correct. all clients who entered/exited during the blackout period should have their data entered into Clarity. Amanda was suggesting that to help prioritize your time, you may want to first focus on entering data into Clarity for clients you are still currently serving, and then you can focus on entering data into Clarity for clients who exited during the blackout period. |
| So....for our ES, person come in off the street to get a bed.....do we have to begin their enrollment in Coordinated Entry and refer them to ES? Not just search for the person like we did in Servicepoint and do an ES entry? | That person should have gone through the Coordinated Entry Access Point (AP) prior to being enrolled in your shelter. If they did not first contact the local AP, then the ES provider should help them call the AP first before enrolling them in ES. |
| So.... do we start input information or wait until everything is available to do so? | You should be entering data. The historical data is the only thing that is affected by the timeline shown. |
| What if they only want to give the last four? | If a client refuses to provide a full social you should document that accordingly in the client record. We just want to make clear that it needs to be client choice, not agency policy. |
| If you are making a referral to say RRH would you need to complete the shelter assessment? | if the person contacted the AP as was unsheltered, and is remaining unsheltered, you do NOT need to complete the shelter assessment. That is only needed if someone will be entering ES. |

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| Can we start entering things into Clairity? I.E. services and referrals and program enteries? | Yes you should be entering data into Clarity now. |
| Will all current client information on Service point have to be individually transferred to the Clarity system? | No, much of the client information is already transferred. The data not yet in Clarity, but on it's way is listed here: https://cohhio.org/wp-content/uploads/2021/08/HMIS-Transition-Webinar-Series-Slides-3.pdf#page=6 |
| When filling ROI it also ask for Location when signed documentation | Yes when documenting a signed ROI you should fill in the location where the paper is stored such as "secured in client file." |
| What happened to bed nights? | You can use the Housing Census reports under Reports>Housing to replace any bed night reporting you were doing in ServicePoint. |
| In the past I was able to print out verification when client is in program is that still available? | It should be. if nothing else, you can still take a screen shot of the program enrollment screen with the basic enrollment info and date and print it. |
| When entering people in "overflow", is this option still going to be listed in clarity? | Yes |
| When will we receive work flow forms? | We are aiming for mid-September |
| Is it possible to convert a webpage APR to a PDF AFTER you have ran the APR Report? | You make be able to print as pdf from your web browser. |
| Is there an easy way to see all of the household members once they are in a program? And their relations? | Household members and relationships are listed on the righthand side of the screen under Household Members in the client record. |
| How far back do we need to go on re-entering ROI's? | What is most important is that you have a current ROI for current clients in the new system. Beyond that it is up to you how far back you enter additional ROIs. |
| What if your local shelter does not participate in HMIS? | The client should remain open in the Access Point program until they are stably housed or you have lost contact with them for 90 days. |

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| Should we re-enter data that was previously entered for a client (such as a ROI) or wait until that data is switched over? | ROIs did not come over so you need to recreate those or do a new one in the new system. You should wait on data that is migrating before re-entering anything in Clarity. |
| Hello, I am the new HMIS Coordinator at FrontLine Service and I need to be able to gain access to this new system. Could you please let me know what steps I need to take? | Request New User Training here: https://cohhio.org/boscoc/training-and-templates/ |
| Where in Clarity do we find the Client ID? The export for SSVF uses the client ID not the Unique Identifier. | Are you referring to like data quality checking? |
| Are there direction on how to run the APR? | the link to the Clarity guidance was on a previous slide in this slide deck - https://get.clarityhs.help/hc/en-us/articles/115013295968--HUDX-227-Annual-Performance-Report |
| Will clients entering a program from a CoC other than BoS or Mahoning be entered through the Access Point? | Yes |
| When can we long into Clarity? | whenever you like! you should have received your login info on Monday. |
| If you have a client in shelter and you have HCRP-RRH do you refer to yourself? | Yes. To generate a RRH referral, you would complete the necessary assessment on the client and refer them to the Permanent and Transitional Housing queue. Once they are prioritized for your program you would reassign the referral to your RRH program, then create a program enrollment. . |
| Do you complete a search on client before entering? | Yes, always! |
| Please cover how you complete a search at the beginning of entering their information. | This is covered in the eLearning course here: https://cohhio.litmos.com/?C=6153282 |
| If a client is in shelter and then need to be entered into HCRP-RRH do we follow the same way as HMIS when entering into two programs when they are active in both? | Yes, you can and should enroll a client in RRH as soon as you begin working with them in that program. The client should be exited from shelter on or before the client's Move-In Date to RRH. |

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| Is the permanent housing track only for literally homeless? It does not have a drop down for SSVF HP. Is it the same as homeless veterans' assessment? | The permanent housing track field was originally designed to be used for the Homeless Veterans Assessment and has been extended to be used in the coordinated entry process. It is only for literally homeless clients. |
| Where can we access the printable slide presentation for this webinar? | https://cohhio.org/wp-content/uploads/2021/08/HMIS-Transition-Webinar-Series-Slides-3.pdf |
| Are we still putting referrals through to RRH? I noticed yesterday when I was in Clarity I did not see that option. | Yes. Referrals were demonstrated in this webinar. The recording can be found here: http://cohhio.org/boscoc/hmis/ |
| When will new forms be available? | We are aiming for mid-September |
| Can we start putting in notes? If we do will it mess up the migration of notes from Service point? | You can begin entering notes. You will not mess anything up. Service Notes are viewable by other agencies, Client Notes are viewable only to HMIS Users at your agency. |
| Will there be workflows published as we had for service point? thanks! | Clarity workflows are published here: . COHHIO will work to publish more detailed and specific workflows in the coming months. https://get.clarityhs.help/hc/en-us/categories/115000086148-Getting-Started |
| Is there an actual user manual available? | https://get.clarityhs.help/hc/en-us/categories/115000086148-Getting-Started |
| When will the SSVF upload be available? | The HUD CSV export has been available since Monday, August 9th. Clarity provides directions here: https://get.clarityhs.help/hc/en-us/articles/115015636287--HUDX-111-HUD-CSV-XML-Program-Data-Export- |
| How do you re-enter a client when they return without changing the previous stay dates? | You should create a new enrollment each time a client stays in your program. |
| Can you please explain again how to enter data during the blackout period. What date do we use? | For enrollments and assessments, use the exact date that the client entered/exited and the exact date that the client was assessed (for covid screening, VI-SPDAT, etc). If the client has already been housed, do not refer the client. There are no backdated referrals. |