



# OHIO

**Balance of State  
Continuum of Care**

## **HMIS Transition Webinar Series Webinar 4 of 4**

**Presenters:** Amanda Wilson, Matt Dicks,  
Carolyn Hoffman, Stephen Holsenbeck

August 25, 2021

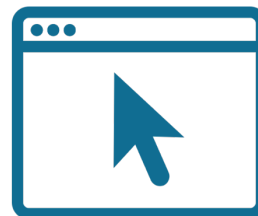
# Webinar Information



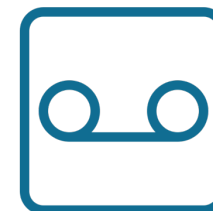
All participants lines are muted.



Use the questions feature in the GoToWebinar control panel to submit questions.



This webinar will be posted to Ohio BoSCoC's website.



This webinar is being recorded.  
<http://cohhio.org/boscoc/hmis>



**Welcome Stephen!**

# Agenda

- COHHIO HMIS Resources
- Data Still Missing from Clarity
- Known Issues
- Blackout Period Referrals
- Release of Information
- Creating Households
- Relationship to Head of Household
- Permanent Housing Track and Expected Permanent Housing Date
- Housing Move-in Date
- Assessment Level
- Looker Licenses
- Temporary Prioritization Guidance
- Data Quality Checking
- Office Hours
- Clarity Demo

# COHHIO HMIS Resources

Resource	Location	Status
<b>COHHIO eLearning Center</b> <b>Clarity Course 2</b> <b>Clarity Course 3</b>	<a href="https://cohhio.litmos.com/">https://cohhio.litmos.com/</a>	We expect these to be ready before August 31 <sup>st</sup>
<b>HMIS Forms</b>	<a href="http://hmis.cohhio.org/index.php?pg=kb.page&amp;id=113">http://hmis.cohhio.org/index.php?pg=kb.page&amp;id=113</a> This location may change as we overhaul the HMIS site.	We expect these to be ready the week of September 13 <sup>th</sup>
<b>Additions to ODH HMIS Forms</b>	<a href="http://hmis.cohhio.org/index.php?pg=kb.page&amp;id=113">http://hmis.cohhio.org/index.php?pg=kb.page&amp;id=113</a> This location may change as we overhaul the HMIS site.	We expect these to be ready the week of September 13 <sup>th</sup>
<b>HMIS Workflows</b>	<a href="http://hmis.cohhio.org/index.php?pg=kb.book&amp;id=4">http://hmis.cohhio.org/index.php?pg=kb.book&amp;id=4</a> This location may change as we overhaul the HMIS site	We expect these to be ready the week of September 20 <sup>th</sup>
<b>Looker Training Resources</b>	<a href="https://cohhio.litmos.com/">https://cohhio.litmos.com/</a> We may offer live training in addition to eLearning.	TBD

# Data Still Missing from Clarity

Type of Data	Data Fields	Status
<b>Assessment-level data</b>	offers, doses, SPDATS, covid symptoms	Data is not imported yet. The next step is vendor's responsibility.
<b>Services data</b>	All services for ES, ES Overflow, RRH, HP (HUD and state-funded)	Data is not imported yet. It will be imported next. (PATH, RHY, & SSVF Services are already in Clarity)
<b>Notes</b>	goal notes, client notes, exit notes, services notes	Data is not imported yet.
<b>Files</b>	file attachments such as rental applications and housing inspections	Data is not imported yet.

# Known Issues

- **Assessment Due Warning**

HMIS Users are seeing an assessment due warning for clients in enrollments. Some of these warnings are behaving outside of the rules of what we chose for the Clarity system. The COHHIO HMIS Team is working to diagnose the problem.

- **Clarity Speed/Load Issues**

- **Services in Enrollments**

Expense amount did not show up for some enrollment services related to rental assistance and security deposits. Please put in an HMIS Help Desk ticket if this is true for you.

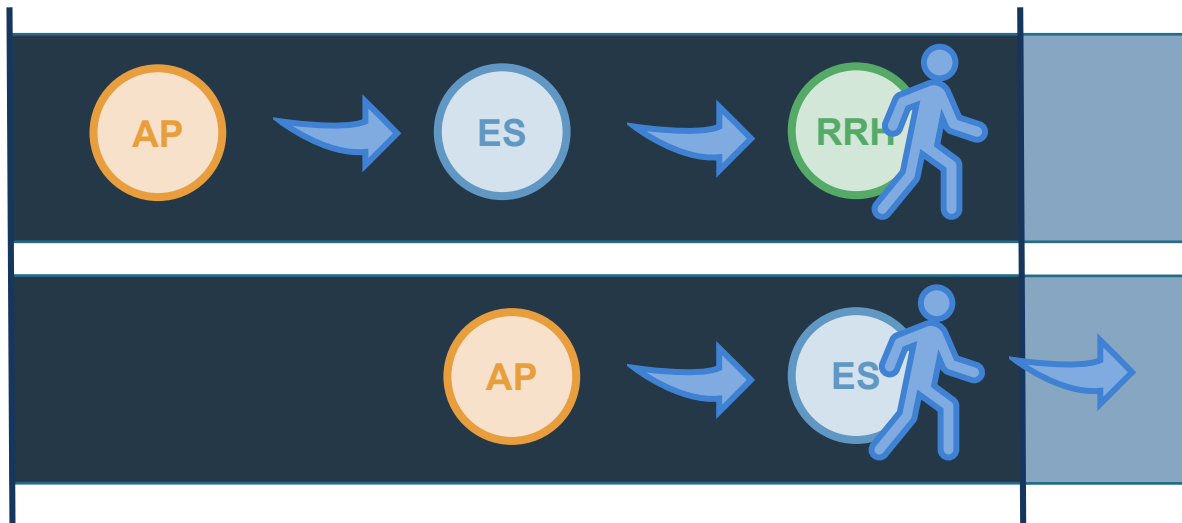
- **Password Reset**

We're having quite a few users with login issues.

# Blackout Period Referrals

7/18/21

8/8/21



Do not enter referrals for AP>ES or ES>RRH. There is no way to back-date referrals.

Do not enter referral for AP>ES, but the client will need a referral for ES>PH.



# Release of Information

- ROIs are Clarity system-wide.
- Currently, if a client has an active ROI, you are prevented from adding an additional ROI.
- Until an ROI is added for clients in the system, HMIS Users will see an orange banner above the client profile reminding them to add an ROI.

RELEASE OF INFORMATION

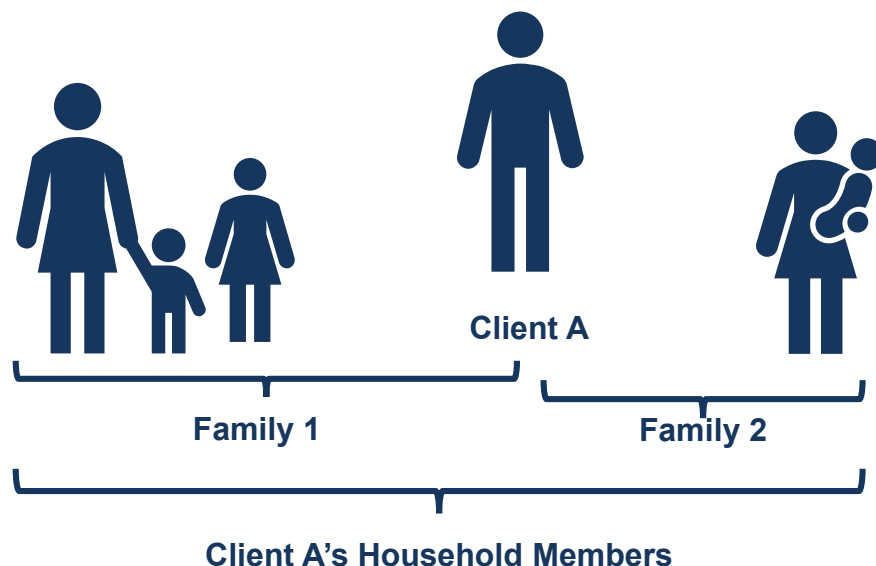
Permission	Yes	▼
Start Date	08/11/2021	25
End Date	08/11/2022	25
Documentation	▼ Select Attached PDF Signed Paper Document Verbal Consent	

CONSENT REFUSED

Consent Refused

# Creating Households

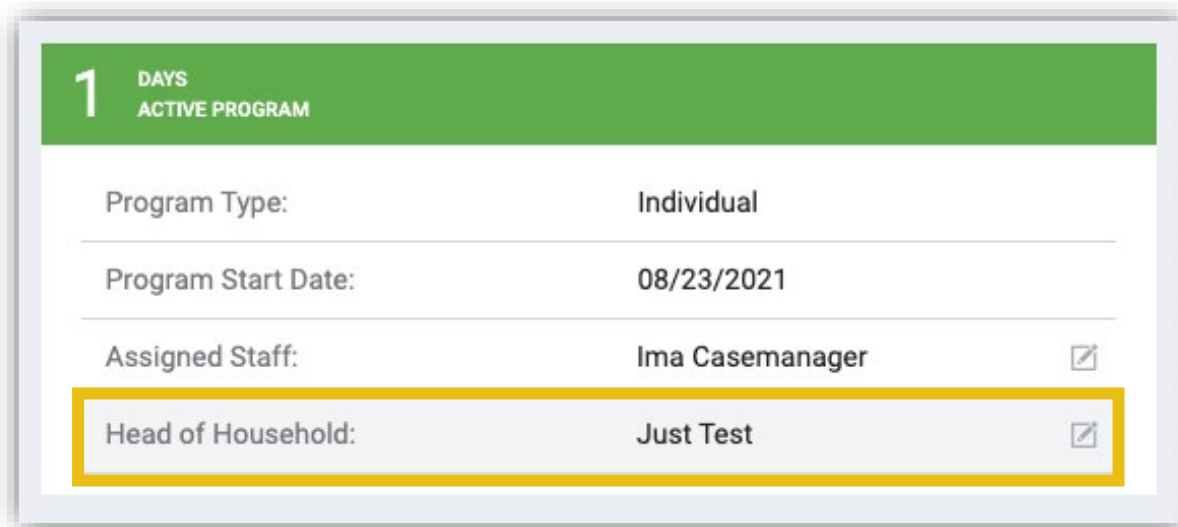
- Find or add each household member in Clarity and then manage the household.
- In Clarity, there is one single household comprised of every client that has ever been in a household with your client. Simply chose to enroll only the relevant clients.





# Relationship to Head of Household

## To change the relationship to head of household:

- Navigate to the Client Profile
- Click History
- Select the relevant enrollment
- In the side menu to the right, you will see an edit pencil to change relationship to head of household



1 DAYS ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	08/23/2021
Assigned Staff:	Ima Casemanager 
Head of Household:	Just Test 

# Relationship to Head of Household Migrated Households

Migrated households' relationship to head of household is correct in enrollments, but appears as "Not Set" in the right side menu on the client's profile. It's not necessary to update, but you can by clicking the edit pencil.

The screenshot displays a client profile interface with a light blue background. At the top, there are three icons: a printer, a calendar, and a shield with a person icon. Below these icons is a yellow-bordered section titled "Household Members" with a "Manage" button on the right. Inside this section, there is a row with the name "Just Test", the relationship "Not Set", and an edit pencil icon. Below the "Household Members" section is the "Active Programs" section, which lists two programs: "Sandusky - GLCAP - ES Overflow" and "Sandusky - GLCAP - AP". At the bottom of the profile is the "Care Team" section, which has a "1" next to the title and a "Manage" button on the right. A circular profile picture with the initials "IC" is located at the bottom left of the profile area.

# Permanent Housing Track and Expected Permanent Housing Date

- **Permanent Housing Track** and **Permanent Housing Date** began as veteran only fields, but now are incorporated into Ohio Balance of State's Coordinated Entry process.
- Please enter the information if you know the answers to these questions; otherwise, leave the fields blank.

BOS CLIENTS ONLY

Permanent Housing Track    Select    ▼

Expected Permanent Housing Date    \_\_\_/\_\_\_/\_\_\_    📅 25

Would the client consent to a COVID-19 vaccine at no cost?    Yes    ▼

If not, what are the concerns?   

SAVE CHANGES    CANCEL

# Housing Move-in Date

Just Test

PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: SANDUSKY - GLCAP - ESG-CV RRH

**Enrollment** History Provide Services Assessments Notes Files Chart × Exit

## Enroll Program for client Just Test

Project Start Date 08/17/2021 

County in which Client Is Being Served  

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

Housing Move-In Date  

# Assessment Level

Coordinated Entry Assessments require you to select an assessment level:

## Crisis Needs Assessment

You should select Crisis Needs Assessment when you are referring the client(s) to shelter.

## Housing Needs Assessment

You should select Housing Needs Assessment when you are referring the client(s) to permanent housing.

The screenshot shows a web application interface for a client named 'Just Test'. The top navigation bar includes links for PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS (which is highlighted), NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, the client's name 'COHHIO VI-SPDAT V3 SINGLE ADULTS' is displayed. The main form contains several fields: 'Assessment Date' is set to 08/17/2021 with a calendar icon; 'Assessment Location' is 'Sandusky'; 'Assessment Type' is 'Phone'; and 'Assessment Level' is 'Crisis Needs Assessment'. The 'Assessment Level' field is highlighted with a yellow border.

Assessment Date	08/17/2021
Assessment Location	Sandusky
Assessment Type	Phone
Assessment Level	Crisis Needs Assessment

# Looker Licenses

- Looker, is a data analytics platform that allows Users to explore system data through reports, dashboards, or pre-configured views.
- Producing prioritization reports will require a Looker license while R minor elevated is unavailable. Emails were sent to license holders on August 20<sup>th</sup>.
- Email [hmis@cohhio.org](mailto:hmis@cohhio.org) if you need to make changes to Looker Licenses at your agency.
- Clarity Looker Help Article: <https://get.clarityhs.help/hc/en-us/articles/115000468328-Introduction-to-The-Data-Analysis-Tool-and-Looker-Resources>.



# Temporary Prioritization Guidance

- All Ohio Balance of State CoC Permanent Supportive Housing (PSH), Rapid Re-Housing (RRH), and Transitional Housing (TH) projects are required to prioritize clients.
- Our usual Prioritization Report is unavailable while our team works to connect R minor elevated to Clarity.
- The person who is responsible for producing a prioritization report for prioritization meetings should have a Looker license. Emails were sent to license holders last week.
- If you need to add a Looker license for an HMIS User at your agency, please email [hmis@cohhio.org](mailto:hmis@cohhio.org).
- [Temporary Prioritization Guidance Training Video](#)

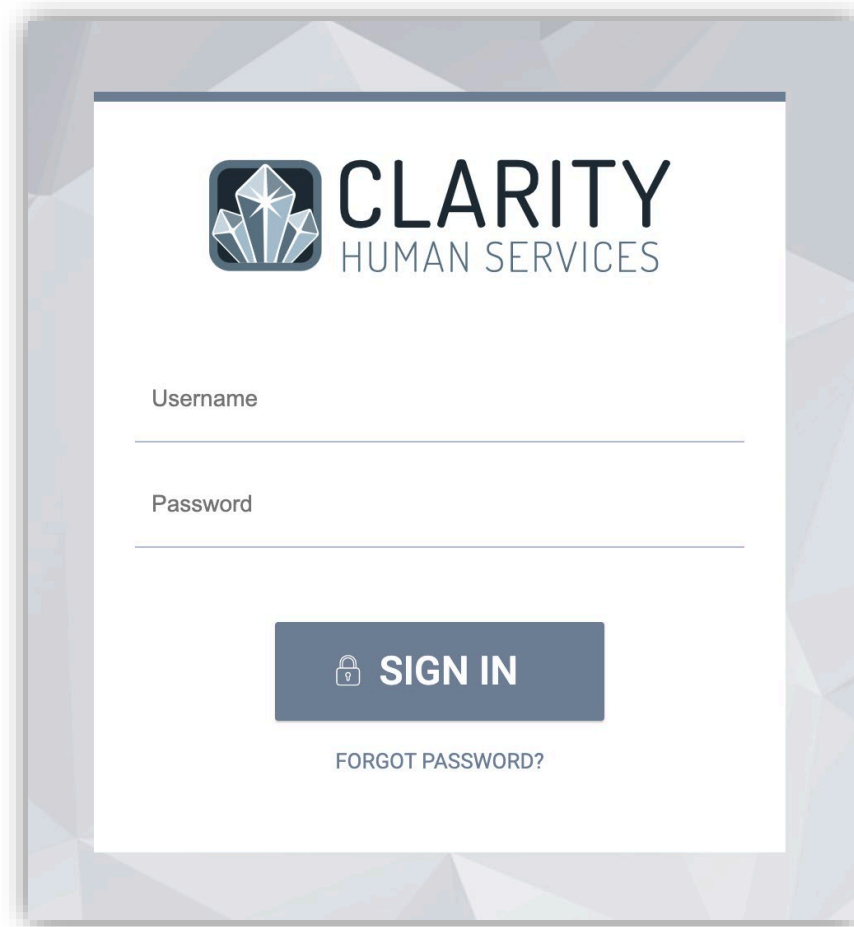
# Data Quality Checking

- R minor and R minor elevated will continue to be our reporting apps for checking data quality. They are not currently connected to Clarity, but will be this fall.
- In the interim, use your APR in Clarity to identify data quality errors. Some HMIS Users have access to multiple agencies, so be sure to switch to the appropriate agency before running the report.
- Clarity's directions for running an APR:  
<https://get.clarityhs.help/hc/en-us/articles/115013295968--HUDX-227-Annual-Performance-Report>


# Office Hours

- **Tuesdays, Aug 17 – Sep 14, 2021 1:00 PM – 4:00 PM EDT**
- 150 attendee limit
- <https://global.gotomeeting.com/join/488830461>

# Clarity Demo




The image shows a login interface for Clarity Human Services. It features a logo with a diamond icon and the text "CLARITY HUMAN SERVICES". Below the logo are two input fields for "Username" and "Password". A dark blue button with a lock icon and the text "SIGN IN" is positioned below the password field. At the bottom, there is a link for "FORGOT PASSWORD?".

 **CLARITY**  
HUMAN SERVICES

Username  
\_\_\_\_\_

Password  
\_\_\_\_\_

 **SIGN IN**

[FORGOT PASSWORD?](#)

# Contact Us



**HMIS**

[hmis@cohhio.org](mailto:hmis@cohhio.org)