HMIS Transition

Frequently Asked Questions

Updated August 26, 2021

| Question | **Answer** |
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| ***General Guidance*** |
| Is there a preferred browser for Clarity? | <https://get.clarityhs.help/hc/en-us/articles/1500000719402-Supported-Web-Browsers-for-Accessing-Clarity-Human-Services> |
| I have not received an email to log into clarity, but I was an end user in ServicePoint. | If you have not received your Clarity login information please email hmis@cohhio.org. |
| Where can I find written guidance for Clarity? | You can find Clarity guidance documents and basic workflows on Clarity’s [Getting Started](https://get.clarityhs.help/hc/en-us/categories/115000086148-Getting-Started) page. The HMIS team will provide more guidance and workflows specific to the Ohio BoSCoC and MCHCoC HMIS within the next several weeks. |
| Do we 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 to the correct Agency (the one currently assisting the client) 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. |
| Do we have access to the Clarity training site? | If you need access to the training site email hmis@cohhio.org.  |
| ***Migration and Transition*** |
| Is there a "due by" date for when all back data that occurred during the blackout period must be entered into Clarity? | No |
| Can you still search for a client with their ServicePoint HMIS number? | Yes. You can search by ServicePoint ID but you should switch to using the Clarity unique identifier for all client records and documentation going forward. |
| ***Access Points and Coordinated Entry*** |
| What is AP? | AP = Access Point |
| What is the role of the AP in Coordinated Entry (CE) processes and in HMIS? | Access Points serve as the front door into the homeless system for the Ohio Balance of State Continuum of Care (BoSCoC). APs are responsible for responding to calls/visits from folks in housing crisis, doing a diversion screening to see if another housing option is viable, and if not, helping the household enter into the local homeless system. Only agencies identified in their Regional CE Plan and included in the regional CE MOU as an AP are able to serve in that role. All AP staff responding to requests for assistance must be trained on the CoC’s standard diversion process and related HMIS workflow. Anyone in housing crisis seeking assistance from the local homeless system must first be screened by the AP. For HMIS, this means that ALL clients will first have an enrollment in the appropriate CE AP or a PATH program before they can be added to the relevant Queue and referred to the appropriate resource.  |
| How do we access our AP to enter client data? | You access your AP provider in Clarity by clicking the dropdown next to your agency under your name and switching to the Coordinated Entry agency.  |
| How do I refer a client from the AP to the local ES project? | After completing the CE AP enrollment and crisis assessment, add the client to the Emergency Shelter queue and assign them to the appropriate program. When the ES provider is ready to intake the client, they will take the client from the queue by completing their program enrollment. The client should remain open in the AP until they have a Move-In Date or permanent housing exit destination. |
| Where do we enter the VI-SPDATs? | VI-SPDATs are entered using the Assessments option in a CE, ES, or PATH enrollment. |
| We have clients that stay unsheltered for various reasons. Once we enter their client info into the 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.  |
| For the permanent housing track, do we answer that before we house them or after? What if I don’t know their housing track when they enter the CE AP or ES project? | You should complete permanent housing track as soon as possible after a client accesses the system. If you do not know what their track is (i.e., what their housing plan is), then you can leave it blank.  |
| 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 outreach to people with serious mental illness who are experiencing homelessness, unsheltered homelessness in particular. We have four PATH programs in the BoS (Lorain, Butler, Clermont and Lake counties) and one in Mahoning County.  |
| Is it okay to have a client dually enrolled in the AP and in an ES project? | Yes, clients can be dually enrolled in AP and other programs until they are permanently housed. |
| How are people exited from a CE AP? | You can manually exit clients from CE AP or allow them to auto-exit. Clients should remain open in CE until they are permanently housed. |
| Are clients auto-exited from the AP? | Yes. If there is no activity on the AP enrollment for 90 days, the client will be auto-exited from the AP. Additionally, if a client has a housing move-in date recorded as part of an RRH or PSH program stay, they will also be auto-exited from the AP on the same date as the housing move-in date. Clients are also auto-exited from the AP when they have a permanent housing destination.  |
| ***Common Workflow Questions*** |
| 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.  |
| 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, it has an X next to it, and it’s somewhat hard to find. |
| Do all household members complete an ROI? | Each adult must have a complete ROI on file. The responsible adult completes the ROI for minor children. |
| What is the visibility for notes I enter on a client in my program? | Client notes are private to your agency. All other notes are shared system wide, which means they are visible to other end users.  |
| If we enrolled a RRH client but then they do not obtain housing and no longer want or need our assistance, do we still simply delete that program enrollment? | NO. If an RRH client is not housed with your RRH assistance, you simply record the appropriate exit destination for them when they no longer wanted to continue with receiving your assistance and are being exited from the program.  |
| How do we add a housing move-in date? | You enter the move-in date via the Enrollment screen. |
| Where do we enter Client Notes? | <https://get.clarityhs.help/hc/en-us/articles/115000463848-How-Do-I-Create-Client-Notes->  |
| ***Referrals and Community Queues*** |
| Do we need to report in Clarity those referrals made for clients served during the black-out period from July18th to Aug 8th? Or only add referrals on clients we did intakes on Aug 9th and after? And do we back date those referrals? | You do not need to report referrals made for clients served during the blackout period. For clients who are still active clients now and in need of PH then you can add the referral (via the Community Queue) on 8/9 or whenever the referral gets made. You are not able to backdate referrals. |
| How do I accept a referral to my RRH or PSH program? | You accept the assigned referral to your agency from the Community Queue by enrolling them in your program.  |
| ***Reporting, Rm and Rme*** |  |
| 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. |
| When will Rm and Rme be updated? | We expect them to be fully connected to Clarity and updated by late September or early October. We will update all end users once this happens. |
| Where do we find our APR in clarity? | <https://get.clarityhs.help/hc/en-us/articles/115013295968--HUDX-227-Annual-Performance-Report>  |
| 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. The most up-to-date APR can be pulled from Clarity by following these directions: <https://get.clarityhs.help/hc/en-us/articles/115013295968--HUDX-227-Annual-Performance-Report>  |
| How should we be monitoring our data quality now, while Rm and Rme are not fully updated? | While we wait for Rm and Rme HMIS DQ reports to be available, we suggest using the APR to monitor for common DQ issues. |