End User Guide for Coordinated Entry

Updated November 2022

Brought to you by:

PPCoC
Pikes Peak Continuum of Care
A PROGRAM OF chp

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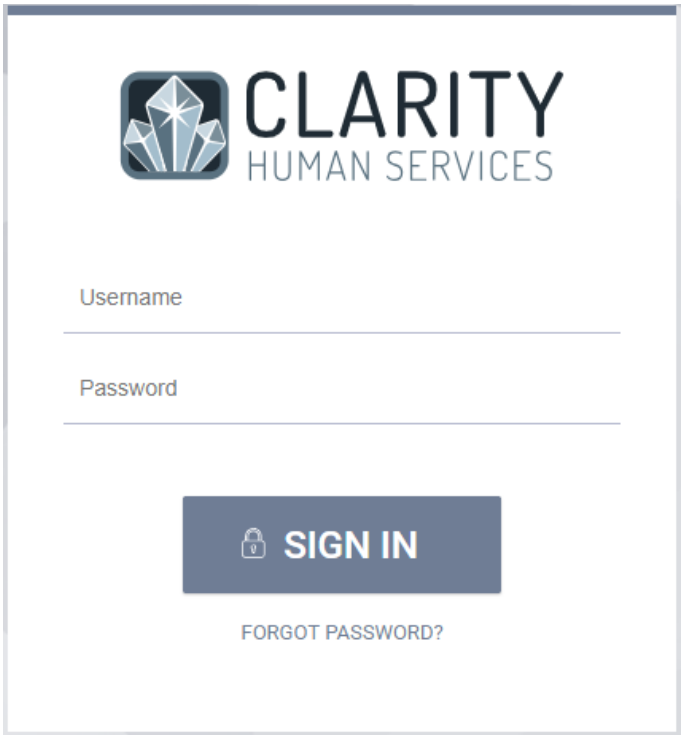
Logging In

Go to the Clarity Human Services website at https://cohmis.clarityhs.com/.



Clarity users require a unique username and password. Your username will be assigned to you. It will typically be your agency's acronym followed by your first initial and last name (i.e., ABCjsmith). You will need to create a new password, which must meet the following criteria:

- 8-9 characters in total length
- Contain upper-case letters (i.e., H)
- Contain lower-case letters (i.e., h)
- Contain Numbers (ie., 9)
- Contain a special character
- Does NOT contain any portion of the user name

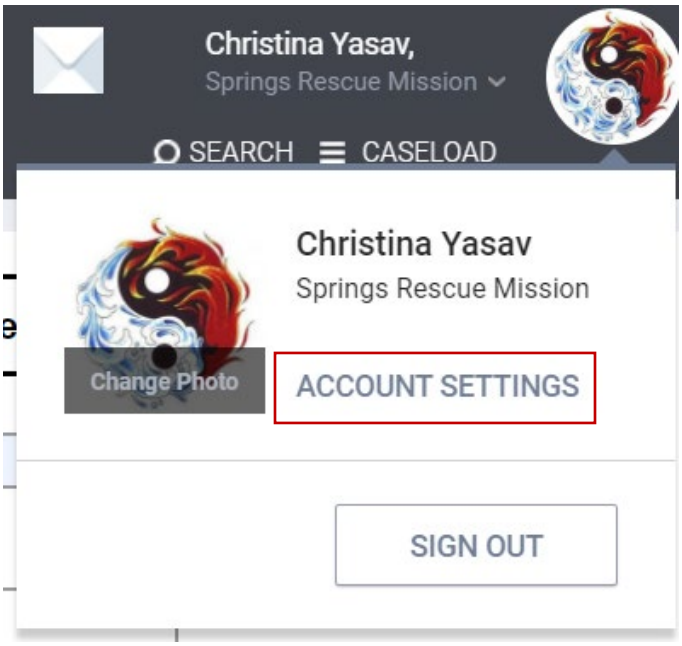
** Example of an acceptable password:* S@mpleP12

Do not share your account. Everything in the system is tracked. Every change that is made is traceable. You, as the user, are solely responsible for what happens under your account. Do not share.

Each HMIS user is also required to submit a signed receipt of privacy notice/user policy during their first login to Clarity. A copy of the policy is available on Zendesk.

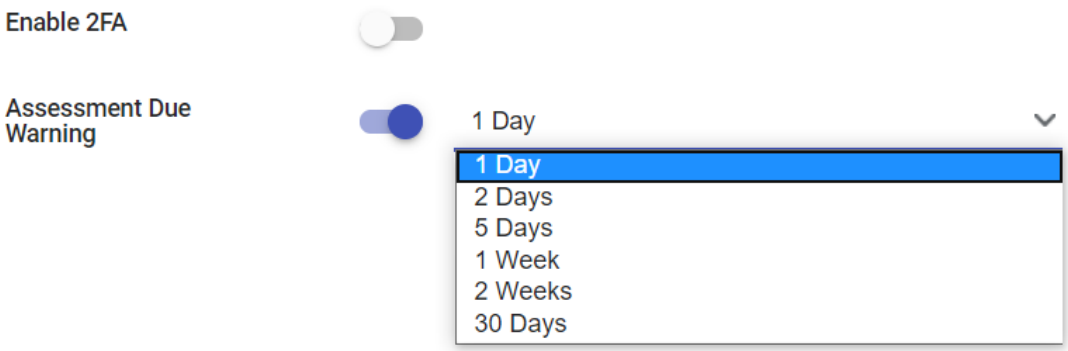
Account Management

Clicking on your Avatar in the top right corner of the screen will allow to you get to your account settings.



In the account settings, you can change your password, set your telephone number, and set up your assessment due warnings. Please do not change your name or email settings yourself. Put in a ticket with your CoC if you need to change this information.

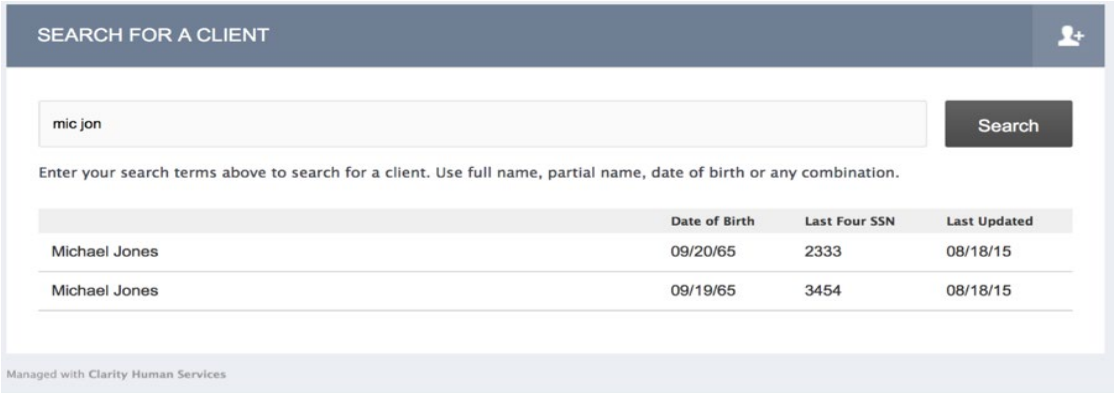
Setting Assessment Reminders: If your program requires periodic assessments, you can ask Clarity to send you an email when you have a client nearing an assessment due date. You can customize how much advance notice you get using the correlating drop down menu.



Searching for a Client

Before entering a new client, you must search to ensure that the client does not already exist in the database using a partial name search.

For example, if you are searching for Michael Jones, entering "mic jon" in the search field makes it much easier to find the correct client. You can also search using the last four SSN digits or a combination of the client name and SSN (i.e. mic jon 2333).

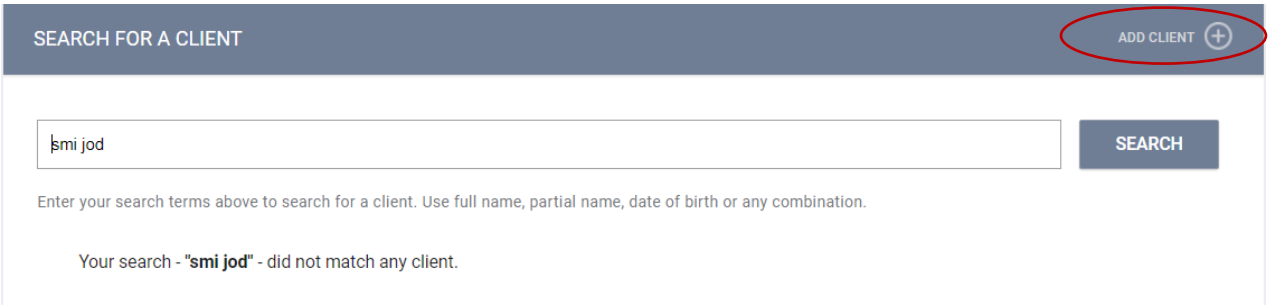


To select a client from your search results, mouse over the client you would like to select to produce an Edit icon.

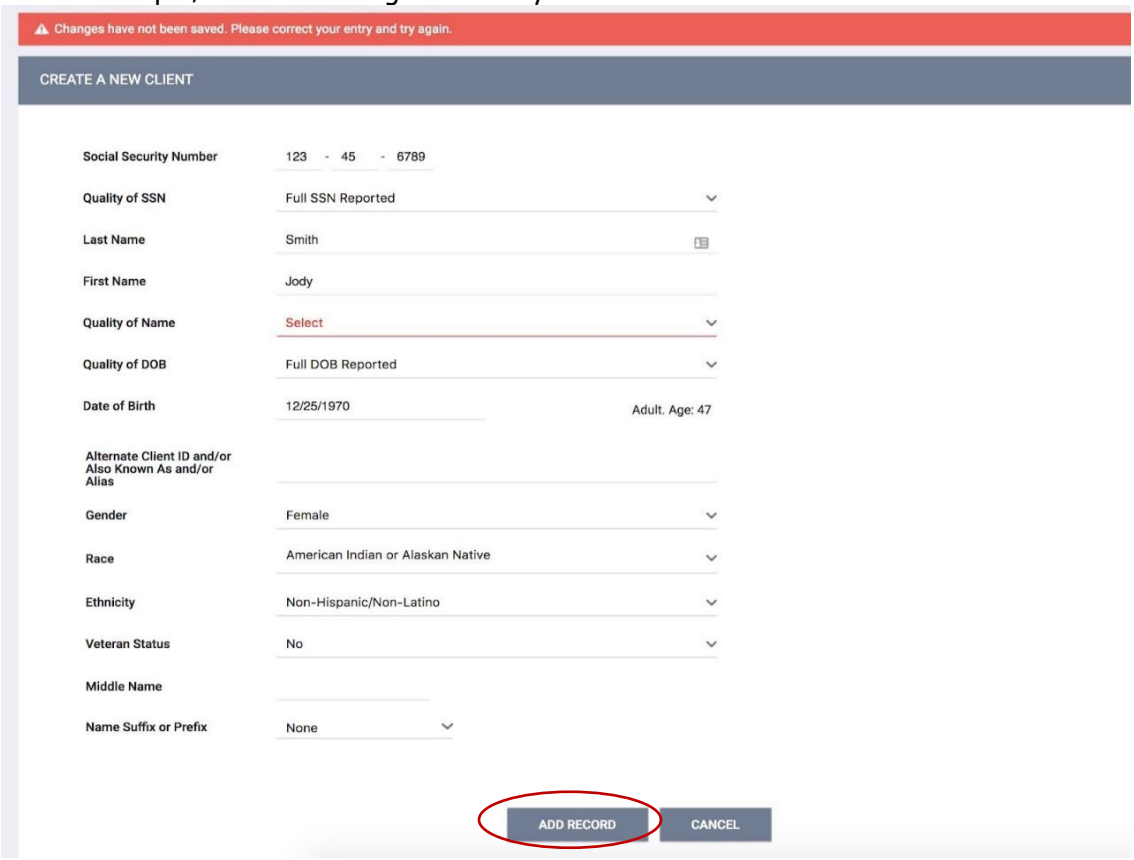
Click on the Edit icon to open the client file.

Adding A New Client

If, after a thorough search, you have determined that your client does not exist in HMIS, click the plus sign next to the words "Add Client" in the upper-right corner of the Search screen.



In this example, we are entering client Jody Smith.



Complete ALL fields on the following Intake screen with the proper responses and click "Add Record" at the bottom of the page when you are finished. All fields REQUIRE complete data.

If any of the required HUD Universal Data Elements have been left blank, you will be unable to save/create the file. These fields will be highlighted in red for your attention. Complete the missing fields and click "Add Record" to create the file.

Please review your intake to ensure accuracy and completeness.

Don't Know/Refused/Data Not Collected:
Selecting "Don't Know", "Refused", or "Data Not Collected" is acceptable and will allow you to save the file. However, each field on this screen makes up the overall data quality percentage for this client. Not making a valid selection in each field will lower the data quality for this client and impact overall data quality percentages for your agency as a whole.

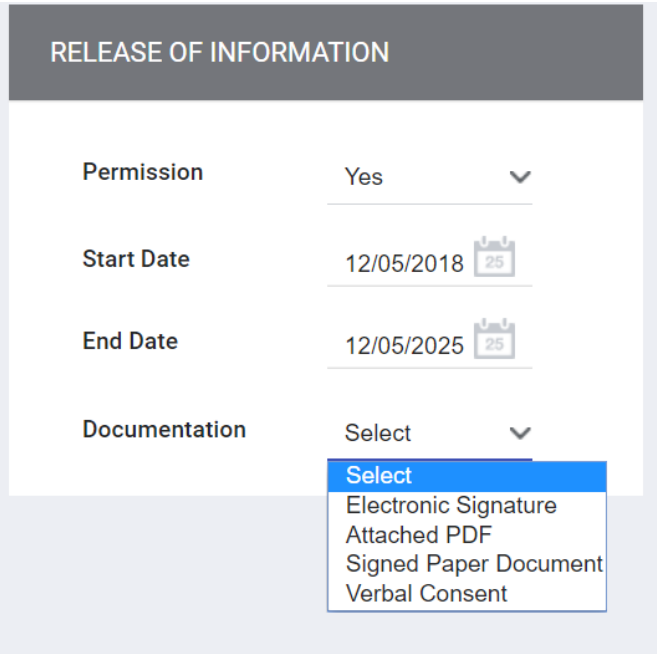
Release of Information

A Client Consent to Data Collection and Release of Information (ROI) must be completed for each client who consents to have their personally identifying information (PII) entered into the Colorado HMIS System. Each child must have the consent status documented in the system separately even though the parent can list all of their children on one paper form.

Acceptable consent type is determined on a program-by-program basis. Written consent needs to be documented in the client profile. The form can be stored three ways:

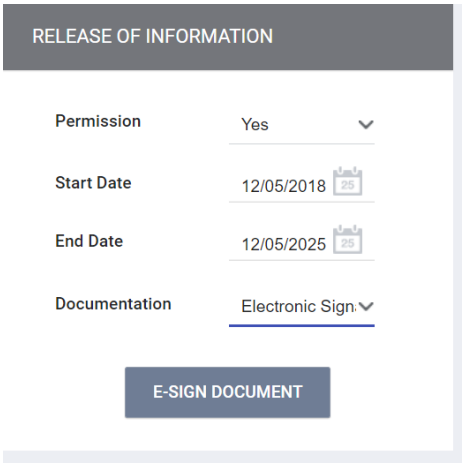
- Electronic: A client can consent by reviewing and signing the ROI form electronically in HMIS.
- Hard Copy Upload: A client can consent by reviewing and signing a paper version of the ROI and having the service provider scan and upload the signature page into HMIS. A PDF version of the ROI form for printing and signing can be found on Zendesk.
- Signed Paper Document: The client signs the paper version of the ROI and the agency keeps the paper on file for at least seven years, noting the location of the paper file in Clarity.

To document consent when a client is added, look at the right-hand side panel. You will see the following options:

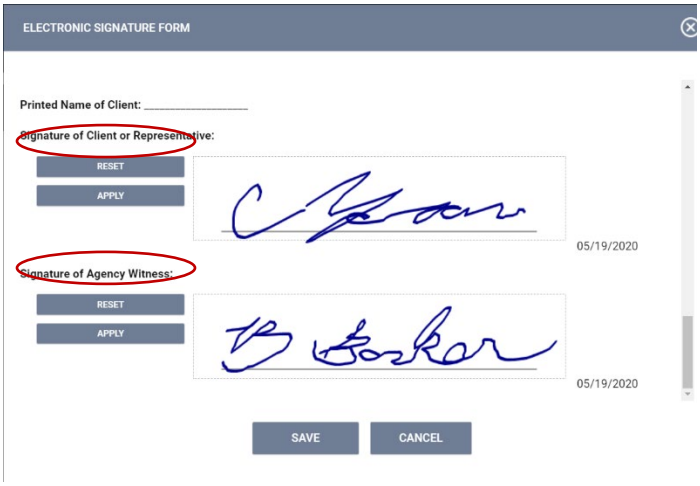


1. For Permission, select "Yes" or "No" to document consent. If "No" is selected, all of the other fields disappear. Click "Add Record" to complete the documentation. Don't forget to also mark the client as Private; see instructions in Section 5 of this guide. If "Yes" is selected, continue to the next step.
2. "Start Date" refers to the date the client signed the ROI. The Start Date defaults to today's date, but it must be configured to reflect the actual date the ROI was signed by the client if it was not signed on the current day.
3. "End Date" is the date that the ROI will expire. It will default to the expiration date configured by the HMIS System Administrator, which is seven years.
4. Documentation for a Client Giving Verbal or Implied Consent: Select the appropriate item in the drop-down list and click "Add Record." No other documentation is required. Keep in mind that only some programs allow this type of ROI. Please contact your DPAL if you have questions about the right type of consent for your program.
5. Documentation for Client Giving Written Consent:
    - Attached PDF: You will be prompted to upload the scanned, hard copy of the ROI signed by your client.
    - Signed Paper Document: indicates that you are storing a physical copy of the ROI onsite without uploading it to the HMIS. Enter the location of the paper document. <u>This option is not ideal and should be used sparingly.</u>

    Electronic Signature:



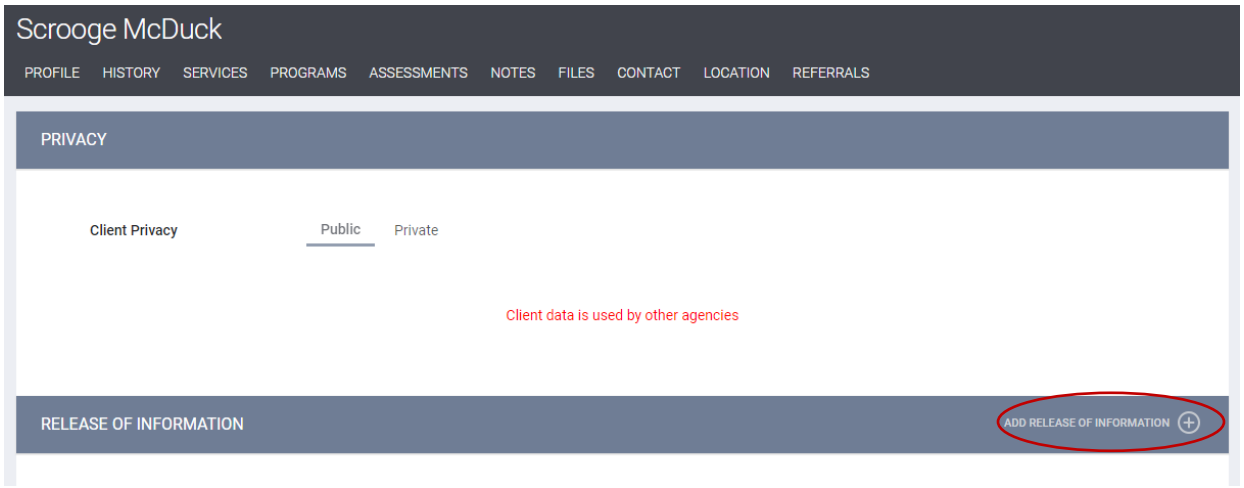
Select "Electronic Signature" from the drop-down menu. Click the "E-Sign Document" button; the ROI form will display. At this point, you can share your device with the client, allowing them to scroll through and read the ROI, and then the client and agency representative should both sign at the bottom. They can sign using a touch screen or using a mouse, or by using a plug-in peripheral such as a Topaz.

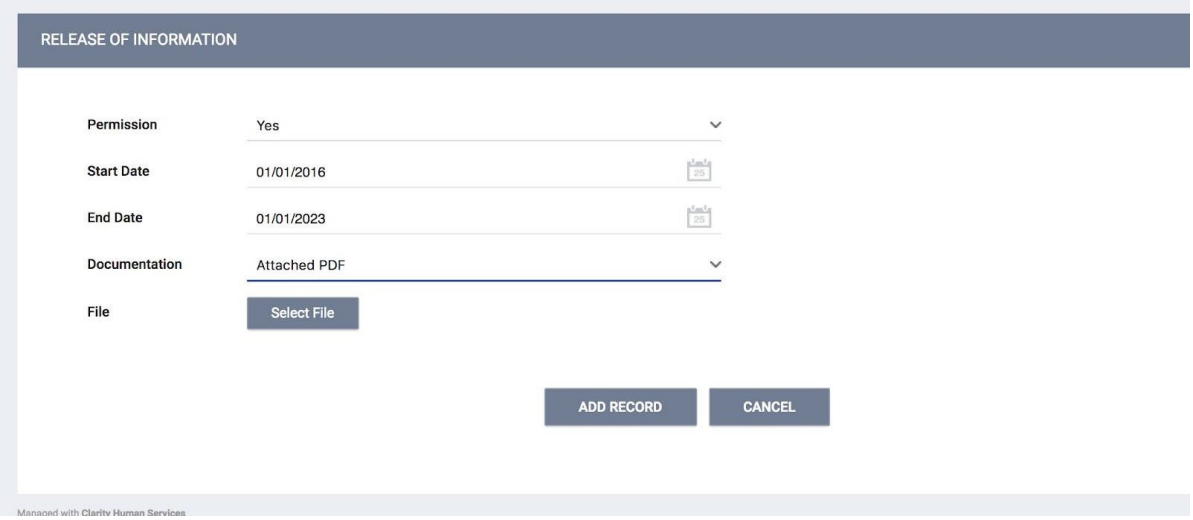


You will need to click "Apply" for each signature before saving.

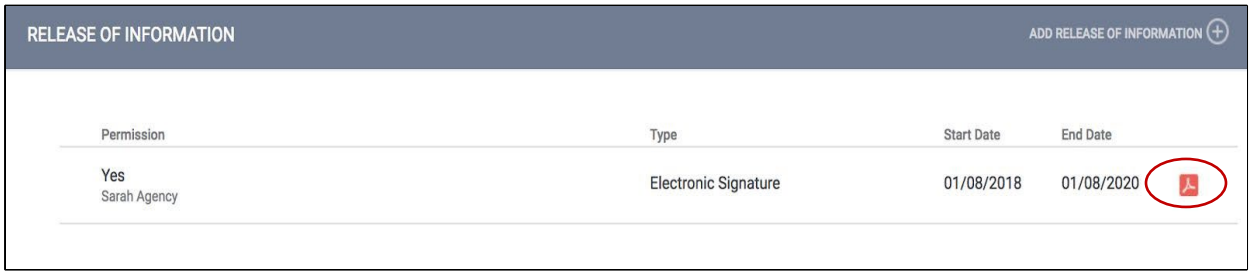
To document client consent on an existing client profile:

Click on the Client Privacy Shield located in the upper right-hand side of the client profile screen and follow the same steps outlined for a new client.





After the client has signed and you have saved the record, the electronic signature will show up in the Release of Information section. Click the red PDF icon at the right to display a PDF of the ROI, including signature, that you can print for the client or for agency records.



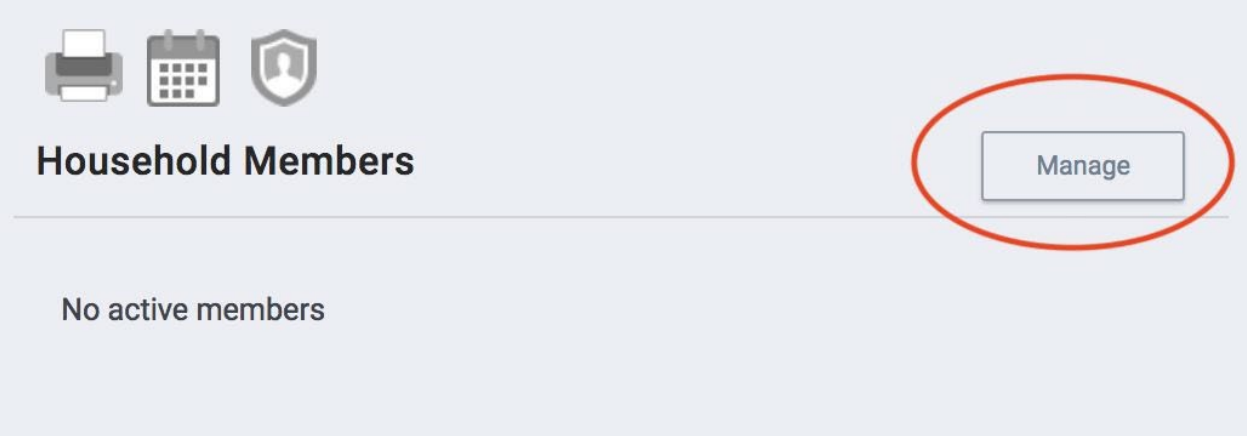
*Note: Only one ROI per client per active start/end date range is permitted. The system will not allow you to upload a second ROI within the same date range for your agency. To document a new consent, the old ROI must be expired.

To Revoke Consent:

1. A client may revoke consent by completing and signing the Client Revocation of Consent form, available at https://cohmis.zendesk.com/hc/en-us/articles/360020127232-COHMIS-Client-Forms/.
2. The agency must then reach out to the Help Desk to ensure proper handling of the client record.

Creating Family/Household Groups

Begin by verifying that each family/household member exists in HMIS. If they do not, complete the steps in Section 4 to create a file for each member. Open the profile for the head of household (HOH). In the upper-right corner, under the Household Members header, click "Manage."

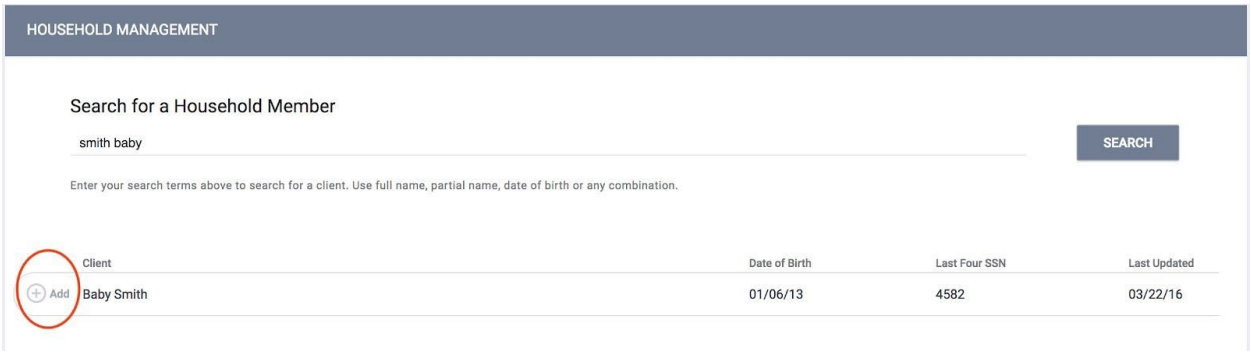


If you have recently accessed the family member files, they will be listed on the right-side menu under the header, 'Your recent client searches accessed.' If the family member is listed there, click the plus sign to add them to the head of household's group.

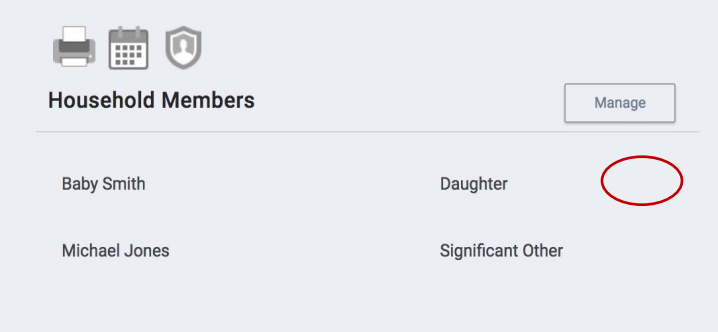
Add Join

NOTE: When a listed client has 'Join' as an option, that person is already part of an existing family/household group. Rather than adding them to your client's household, you are given the option of joining your client to the existing group. Pay careful attention to the result.

You also have the option of searching for members directly from the Family/Household Management screen.



Complete the same steps for each member until all clients are listed in the Family/Household Members section in the upper-right corner of your screen.

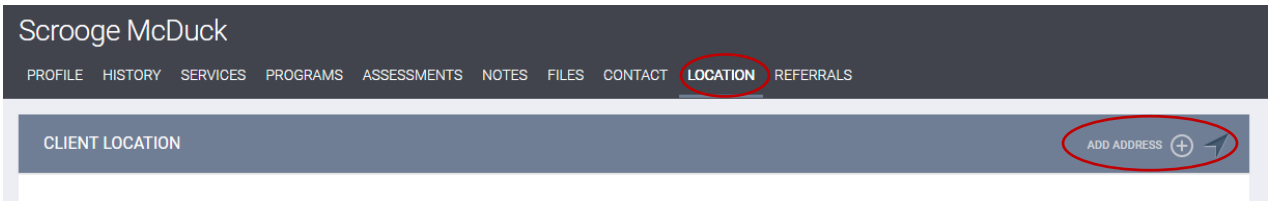


If a member leaves the household, clicking the Edit icon from the Members list will allow you to enter an End Date to remove them from the group. The edit button will populate when you hover your mouse pointer over the client. Removing a person from the global household does not automatically exit them from any programs they might be participating in with the household, so don't forget to exit them from your program when appropriate.

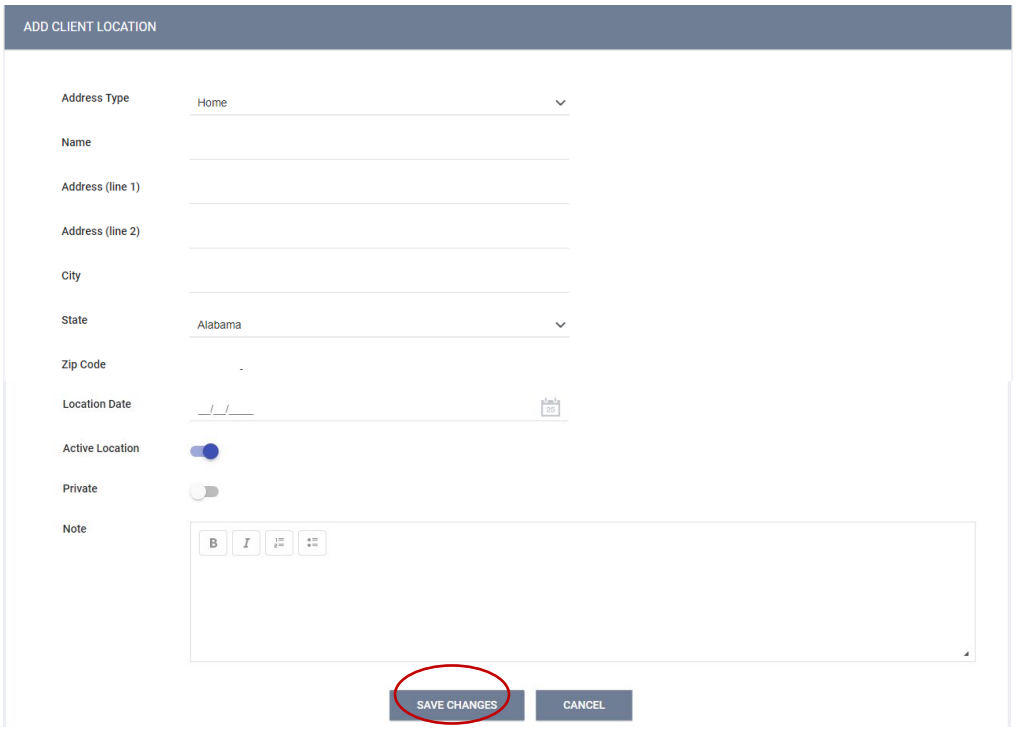
Adding Address and Contact Information

The default sharing setting for address, email, and phone number is to share across agencies, but it is possible to make this data private if there are concerns about sharing a client's location. Marking a listing as "Private" will still make it available to anyone with Coordinated Entry access.

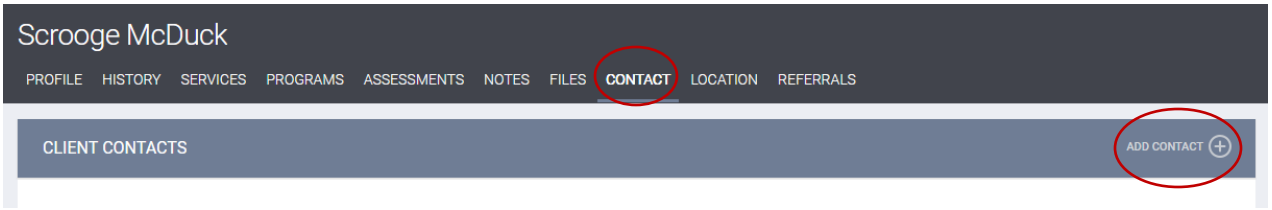
1. Click on the Location tab in the client file. Click "Add Address."



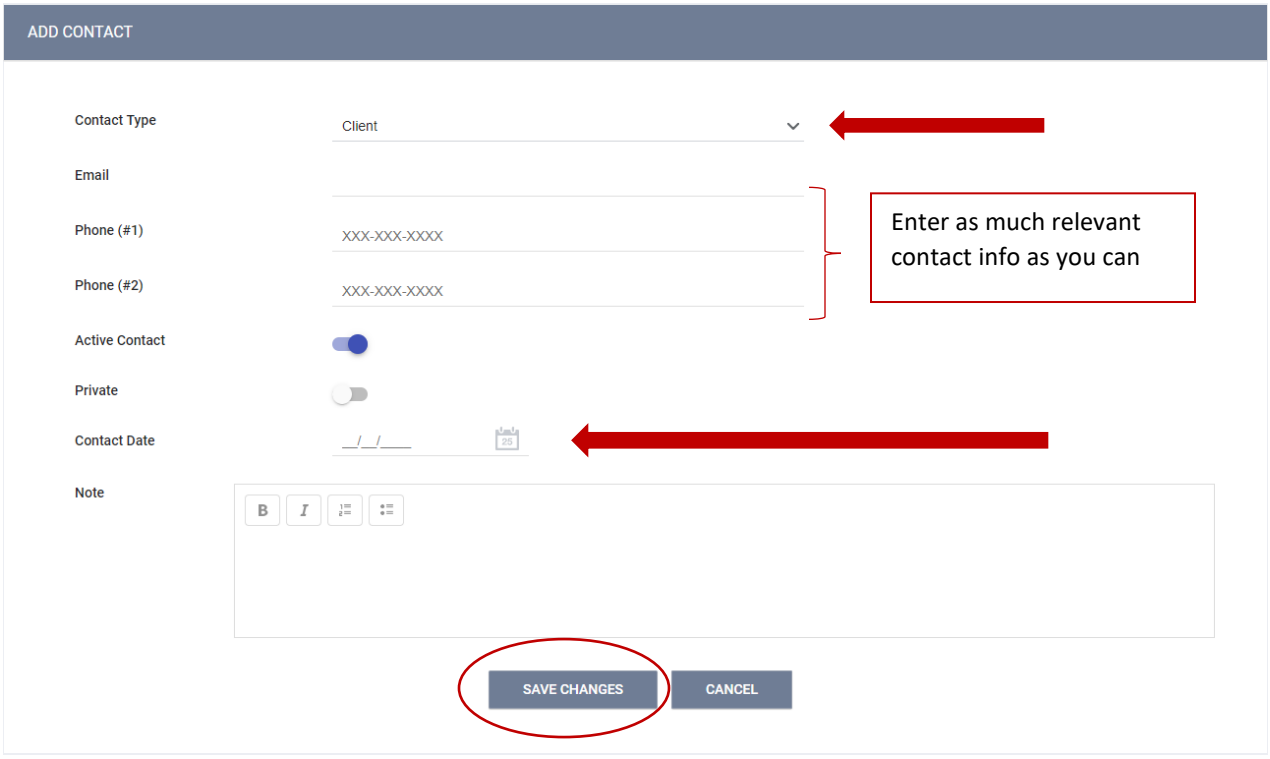
2. Complete the location information and click "Save Changes." If you do not want to share this client location, toggle on the Private switch so that only members of your agency will see the listing. Required elements on this page are Name, Address, City, and Location Date



For phone numbers and email addresses, go to the Contact tab and click "Add Contact."



Enter the appropriate information, including at least the contact type and date, then click "Save Changes."


ADD CONTACT
Contact Type
Client
Email
Phone (#1)
XXX-XXX-XXXX
Phone (#2)
XXX-XXX-XXXX
Enter as much relevant contact info as you can
Active Contact
Private
Contact Date
__/__/____
Note
B
I
SAVE CHANGES
CANCEL

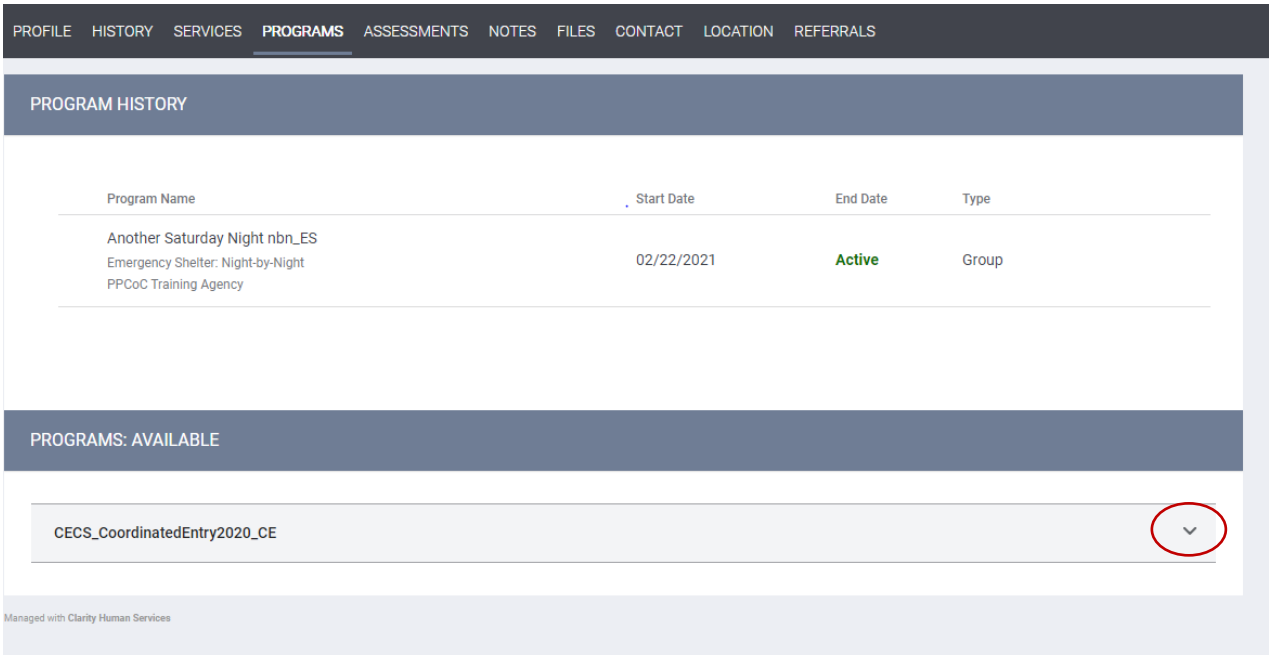
Enrolling Clients into Programs

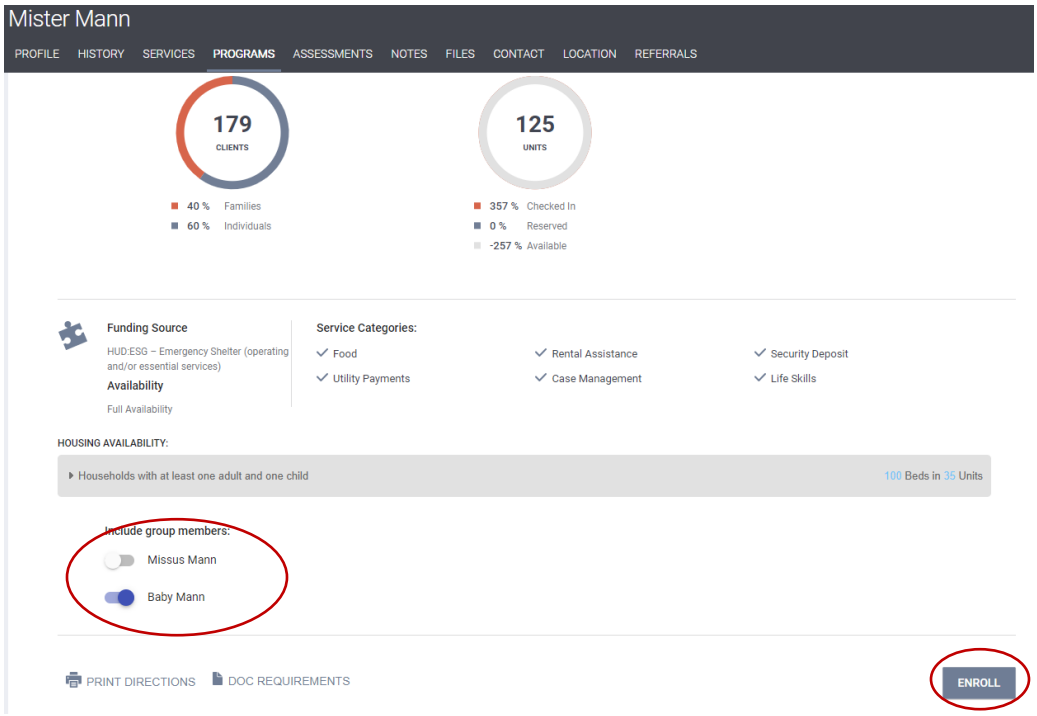
The Programs tab in the client file contains two sections:

Program History -- provides a listing of programs your client is either currently enrolled in or has been enrolled in in the past.

Programs: Available -- lists current programs provided by your agency that are available for client enrollment.

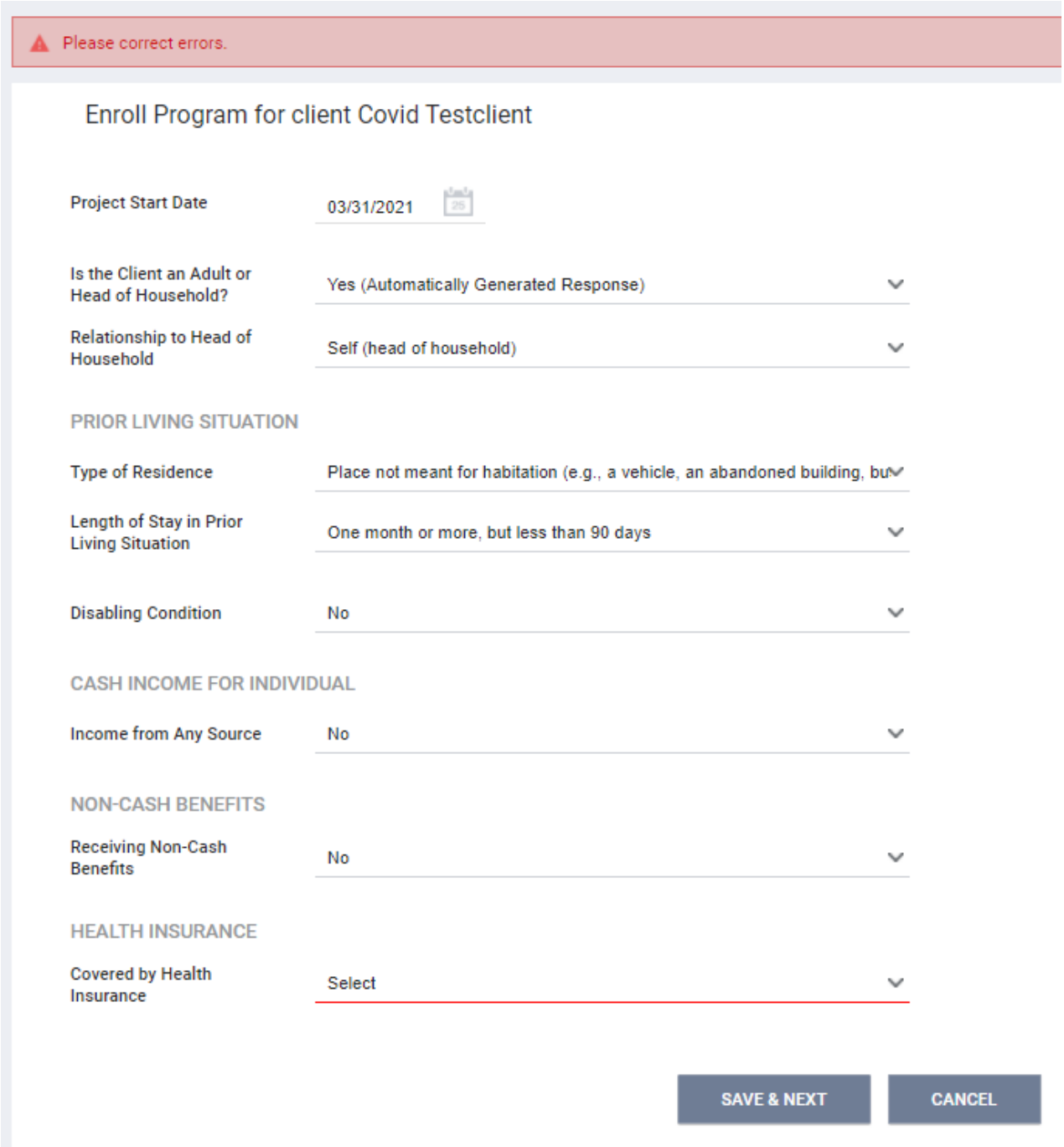
To enroll a client/household into a program, simply select the down arrow next to the applicable program title under Programs: Available.





Select the group members to include by toggling their switches to the right and click "Enroll." In this example, we are enrolling Mister Mann and including his family member Baby Mann. Missus Mann is not included in this enrollment. (Note: The family members will become part of the Group Enrollment when we toggle to include them before clicking "Enroll.")

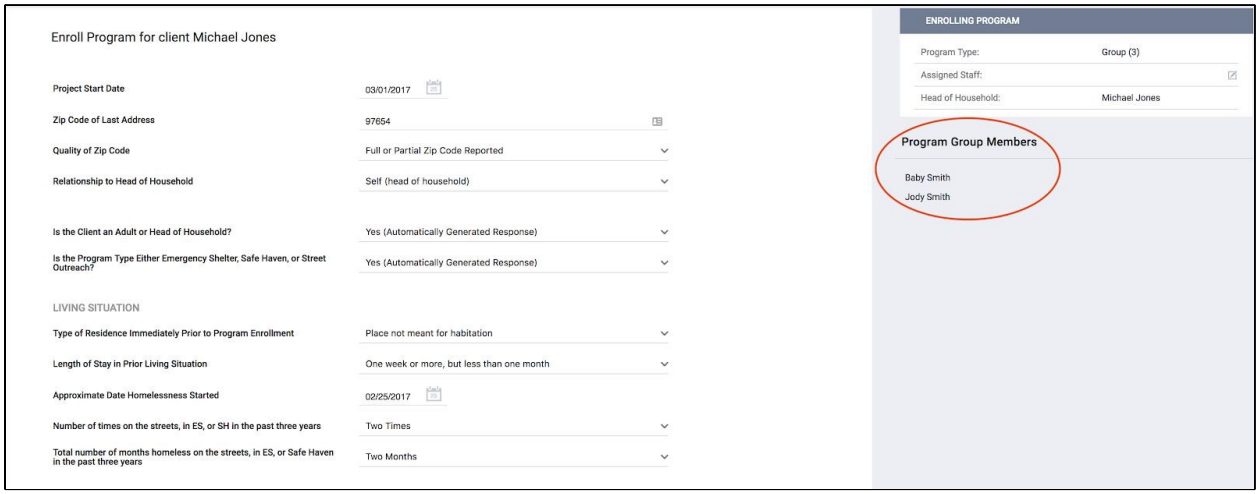
It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to the required APR for your program(s).



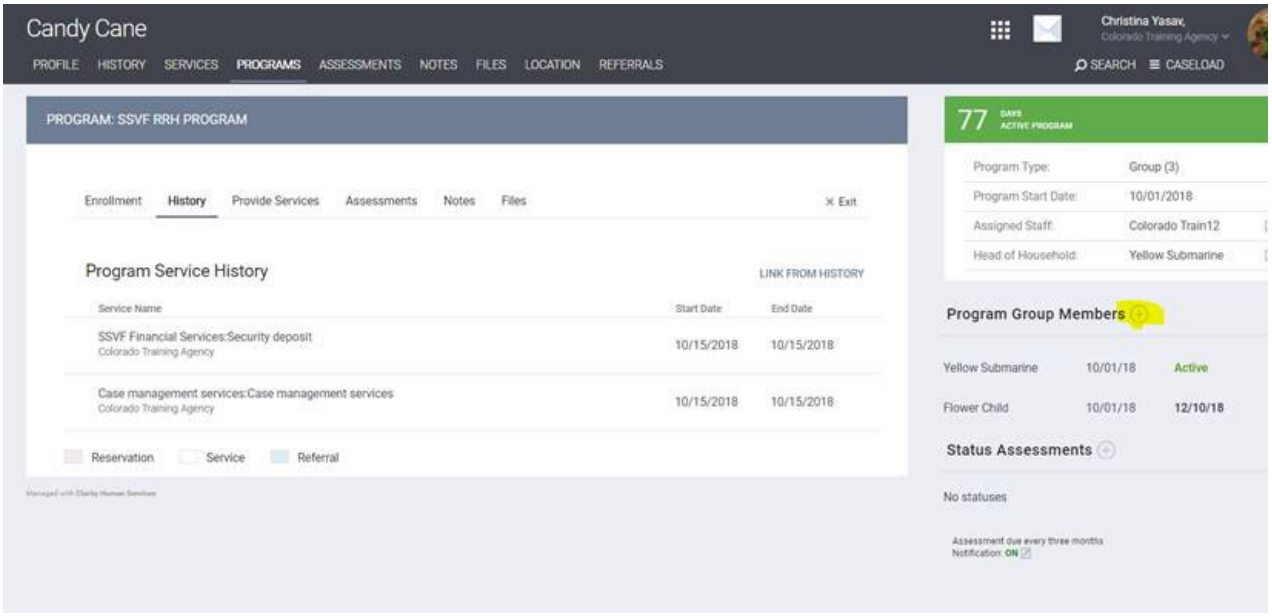
In the example above, one of the required program fields was left blank, illustrating that you cannot save an enrollment without all of the data elements that are required.

Complete ALL fields in the enrollment page for your client and click "Save & Next." If you toggled any family members to be included in this program, their Enrollment page will automatically come up next until each member's enrollment has been completed. Continue to click "Save & Next" after completing each group member's Enrollment. The last family members' save button will say "Save

and Close". Enrolled family members will be listed in the right sidebar under 'Program Group Members.'



To add a member of the household to an existing program enrollment (such as a new baby), create a profile for the new member, if necessary, and assign them to a household. Then, go to the HOH's profile, go to the Programs tab, click the Edit icon next to the program name, then click the plus sign next to program group members (see below). This will pop up a dialog box that will allow you to toggle additional household members into the program.



Program Tabs Overview

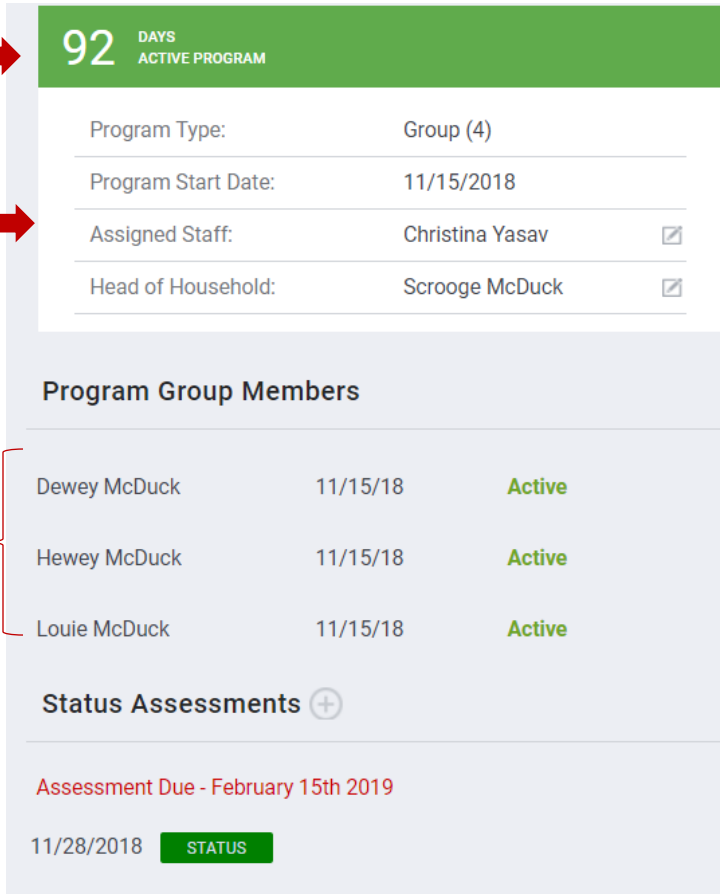
- Enrollment – Opens the enrollment screen that was completed at intake
- History – History of client's services associated with the program
- Provide Services – Allows placement of services associated with the program
- Assessments - Option to view/edit or add a Current Living Situation or VI-SPDAT
- Exit – Opens the exit screen to be completed at termination of the client's program stay

Right-Hand Side Menu of the Program Page:

Current Program Status; Length of Sta

Caseworker Name
(defaulted to user who enrolled client)

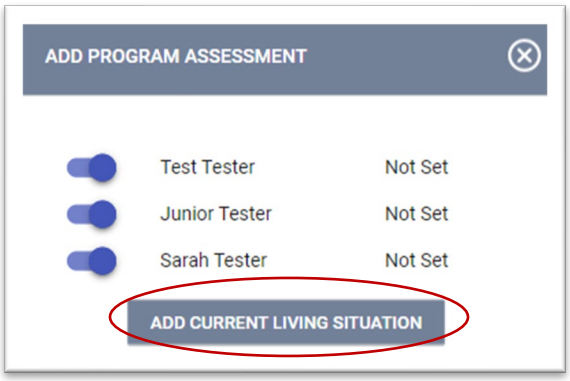
List of Group Members with Program Entry and Exit Dates



Completing the Current Living Situation Assessment

From the Programs tab, open the enrollment by clicking the Edit icon. Navigate to the Assessments tab, then click the "Start" button for the Current Living Situation assessment.

If this enrollment is a Group enrollment, you will be prompted to select which household members you would like to provide an assessment for. In most cases, this will be all members.



Move the toggles as appropriate and click "Add Current Living Situation." Fill out the fields as appropriate and click "Save & Next" when you are finished. If this is a group enrollment, additional members' assessment screens will appear until each has been completed.

Completing the VI-SPDAT

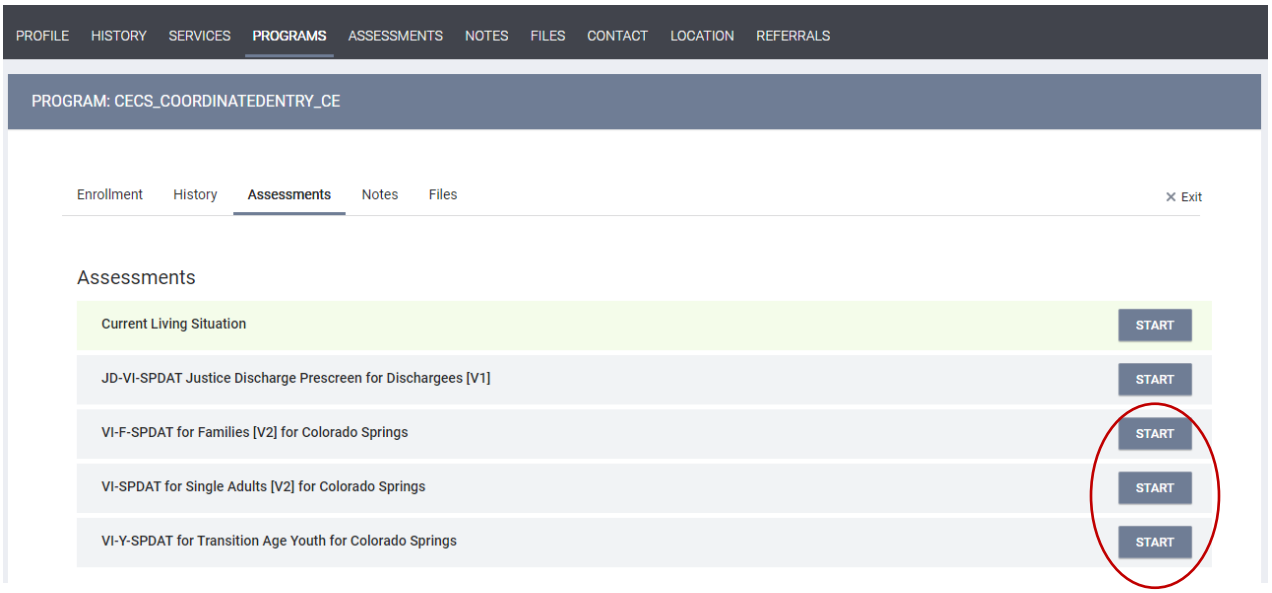
If the client qualifies as "literally or imminently homeless", go into the program enrollment and navigate to the Assessments tab. Choose the correct version of the VI-SPDAT, verify the date, and answer the questions in the drop-down menus.

Which VI-SPDAT Should I Use?

VI-SPDAT
This VI-SPDAT needs to be administered to all unaccompanied adults (25+), and all adults in Adult Only Households. If there is more than one adult presenting in an Adult Only household, each adult should be administered a VI-SPDAT.

F-VI-SPDAT
This VI-SPDAT is administered to all households containing at least one Adult (over 18) and at least one minor child (under the age of 18). This also includes HOHs (under 18) if they have a minor child. Some examples would be a 17-year-old mother and her baby, or a husband and wife (both over 18) and their 4 children (under the age of 18). The F-VI-SPDAT is administered to the HOH ONLY.

TAY-VI-SPDAT
This VI-SPDAT is administered to transitional-aged youth and unaccompanied minors (age 24 and under). This includes households containing more than one youth/minor. Each youth/minor presenting should be administered a TAY-VI-SPDAT. NOTE: This does not include a youth/minor with a child – these households should be assessed with the F-VI-SPDAT.

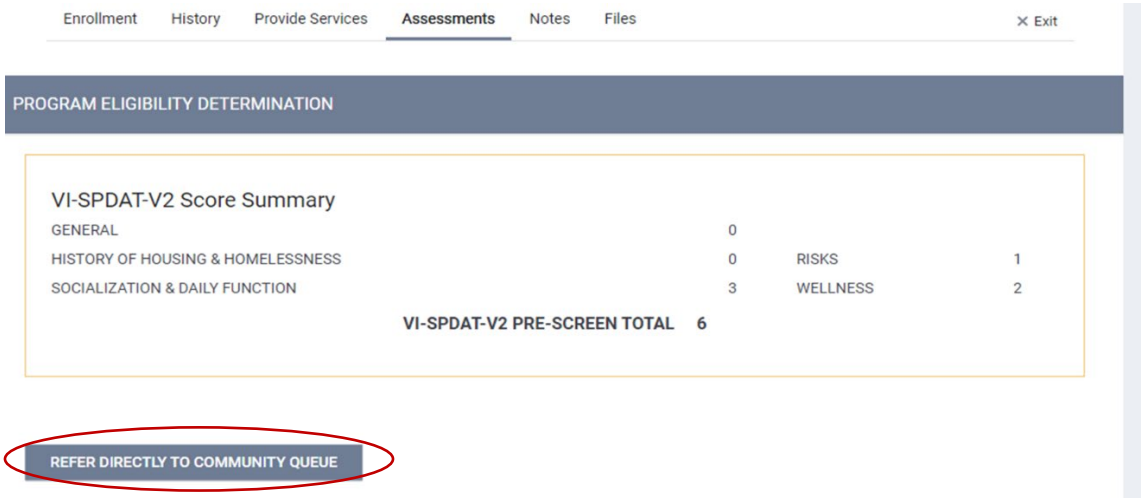


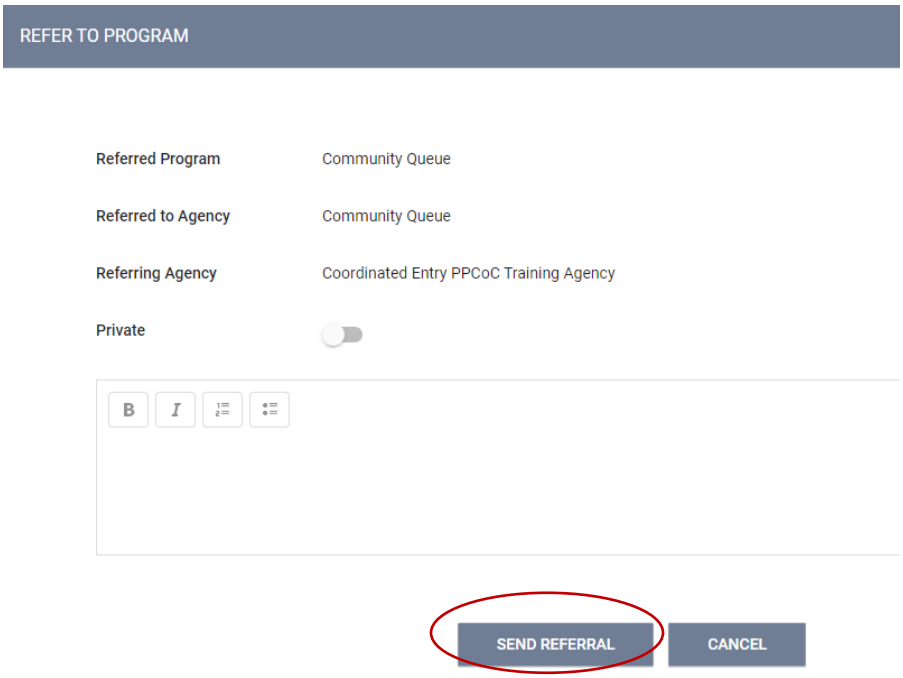
The first set of questions are for the end user to select. They are not on the VI-SPDAT itself. Choose the appropriate options for location and type, and make sure to select 'Housing Needs Assessment' for the Assessment Level.

Sometimes, questions in Clarity will not be asked because they do not apply to the clients' situation (such as the pregnancy question for males or the age-dependent questions at the end of the Family VI-SPDAT). In these cases, enter "Data Not Collected" if available, or, if that isn't an option, select "Client Doesn't Know" as the response.

Referring to Community Queue

Once you have finished the VI-SPDAT, you will be taken to the following screen. Make sure your screen is facing away from the client or any casual onlookers, as it is our community's policy to NOT share the clients' score.

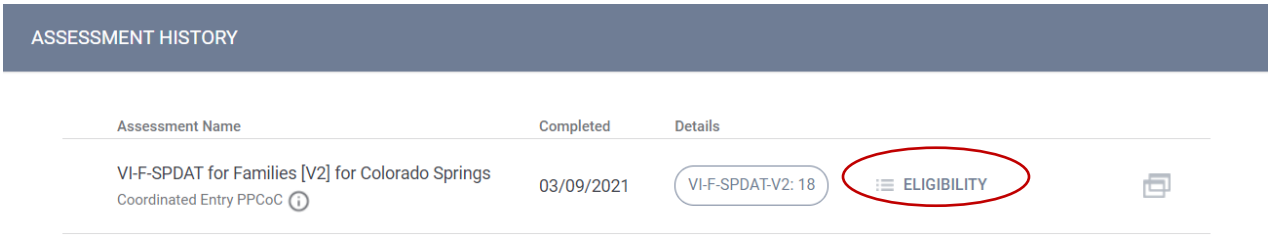




Click the "Refer Directly To Community Queue" button, then, on the next screen, click "Send Referral." There is also a notes field on the Send Referral page. This field is optional but, if you decide to use it, the note should be very brief and relevant to the clients' potential housing situation, like "Needs wheelchair access" or "Has three dogs."

If you forget to refer a household to the community queue immediately after the VI-SPDAT has been completed, you can go back to the "Assessments" tab under the program and then click

"Eligibility" next to the client's most recent VI-SPDAT in the 'Assessment History' section to access the aforementioned referral screen.

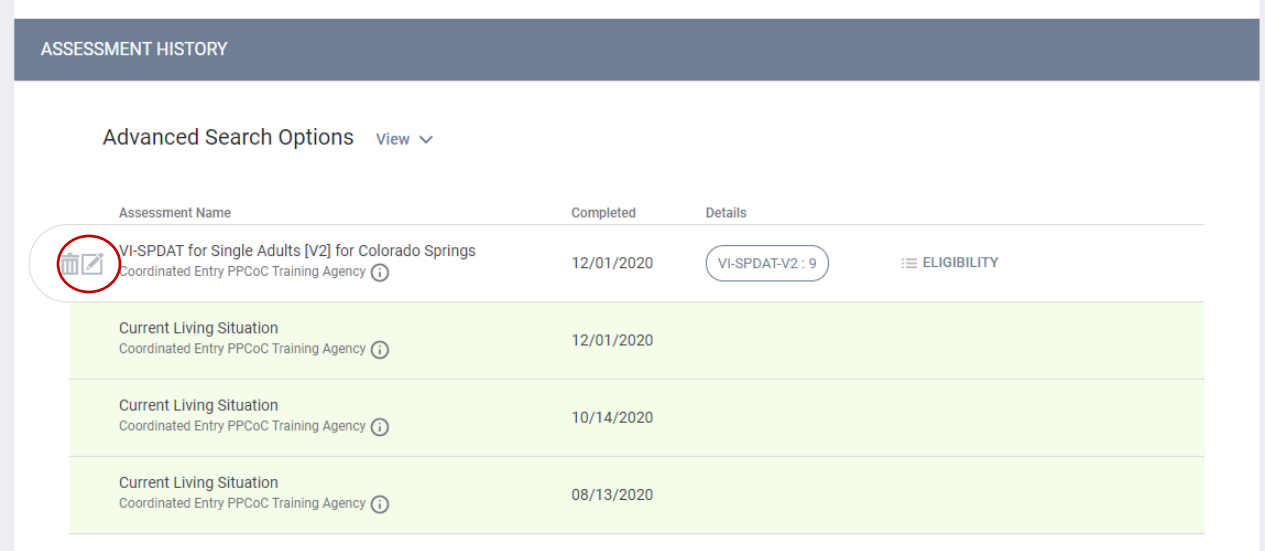


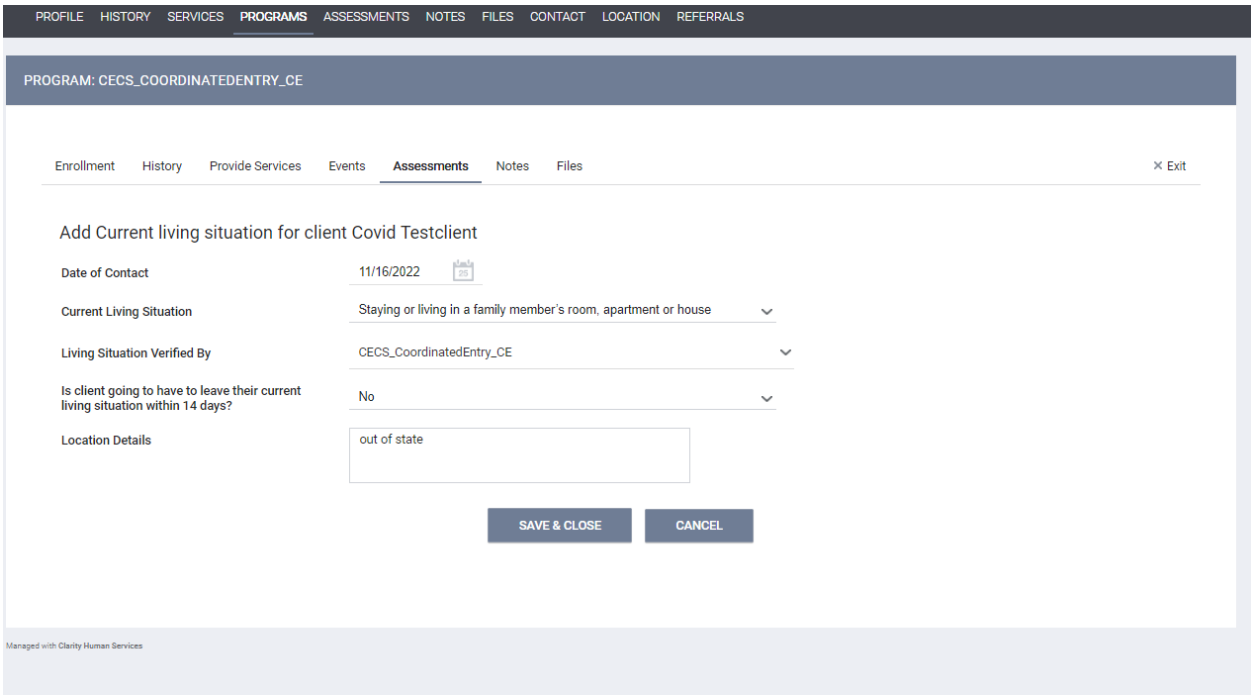
Updating an Existing CE Enrollment

If you have a client returning to check in, you should record the following:

- A new Current Living Situation assessment
- Update (edit) the existing VI-SPDAT
- A new Coordinated Entry Event, if applicable

To update the VI-SPDAT, navigate to the Assessments page. Hover your mouse over the existing VI-SPDAT record to populate the edit button. Change the date on the assessment, then modify the responses as necessary. It is strongly recommended that the responses to the questions in Section A ("Where do you sleep most frequently?", "How long has it been since you lived in permanent stable housing?", and "In the last three years, how many times have you been homeless?") are updated since these impact household eligibility for housing programs and are reflected on the weekly Coordinated Entry By Name List.




PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS
PROGRAM: CECS_COORDINATEDENTRY_CE
Enrollment History Provide Services Events Assessments Notes Files
× Exit
Add Current living situation for client Covid Testclient
Date of Contact
11/16/2022
Current Living Situation
Staying or living in a family member's room, apartment or house
Living Situation Verified By
CECS_CoordinatedEntry_CE
Is client going to have to leave their current living situation within 14 days?
No
Location Details
out of state
SAVE & CLOSE
CANCEL
Managed with Clarity Human Services

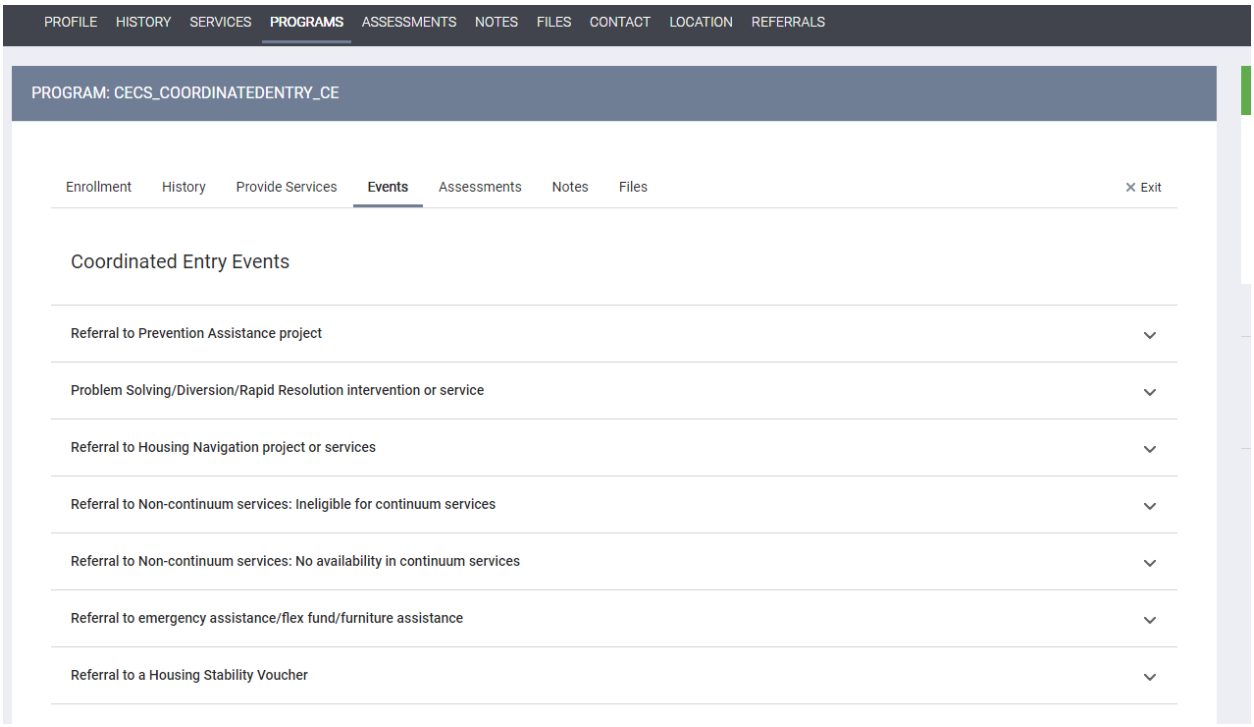
Coordinated Entry Events

If a client self resolves their housing crisis or leaves town, this should be recorded as a CE Event.

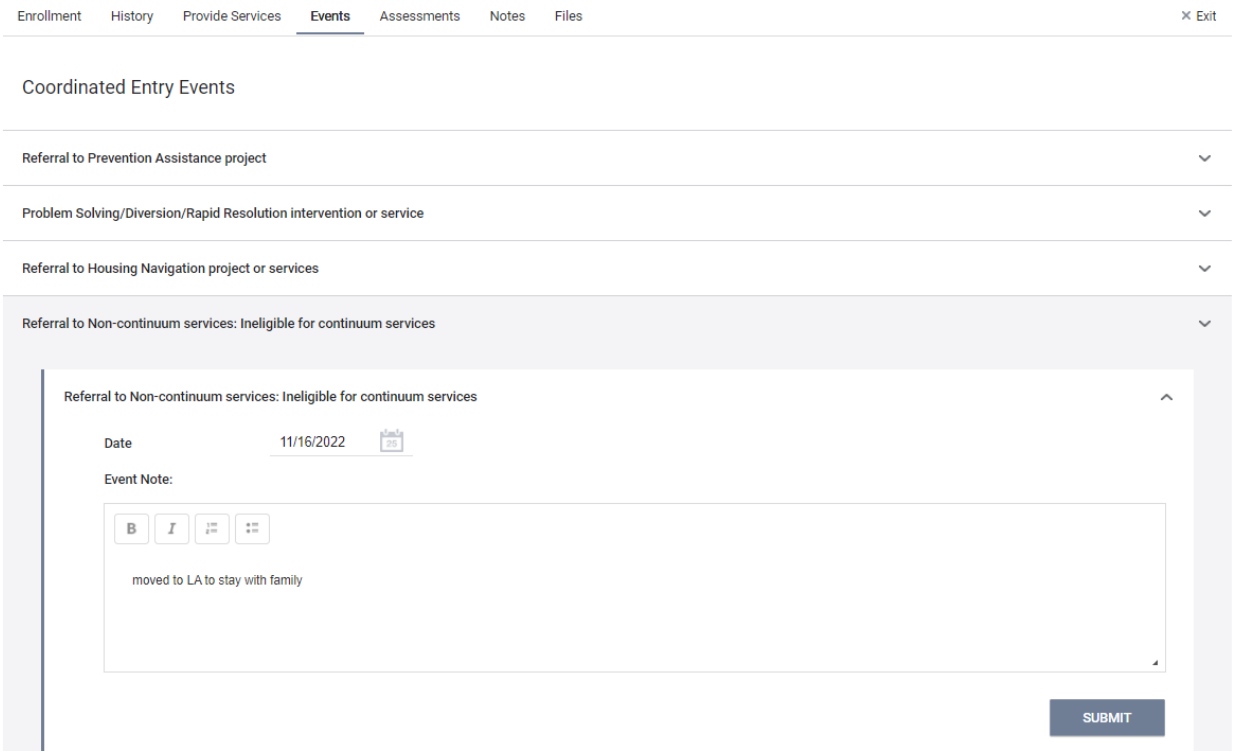
To record a CE Event:

Edit the program

Click on the Events tab



Click the arrow next to the appropriate Coordinated Entry Event to expand the drop down., fill in the appropriate fields, provide comments in the service note section (if more information is needed), and click Submit. In the example below, the client left town to move in with family.



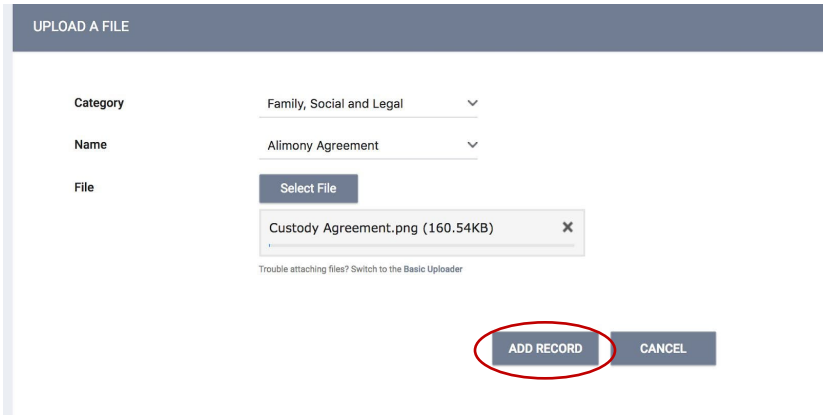
Make sure the client has an updated Current Living situation. The CE admin team will remove the client from the Community Queue and exit them from the coordinated entry program with a destination that matches the most recent Current Living Situation record.

Uploading Files

NOTE: This section will assume you have previously scanned and saved documents into separate files that are accessible through your computer.

Click on the Files tab in the client's record to open the Client Files page. Then, click "Add File" in the upper-right corner.

Select a category and name from the drop down menus that closest resemble the type of file you are uploading.



Private – When checked, the file becomes Private and only your agency will have the ability to view the file. When unchecked, regular sharing rules for your agency apply.

Click "Add Record" to complete the upload and save.

Once a file is uploaded, it is saved to the File tab by order of the upload date. There is no limit to the number of files that can be uploaded for each client.

If the file you uploaded has personal protected information on it, don't forget to either store the file securely or simply delete it from the computer.

You can view the existing file simply by clicking "View." You can also edit the document by uploading a new version.

Clarity supports common file types (Word, Excel, PDF, JPG, PNG, etc.).