Clarity HMIS – Cheat sheet of Basic Steps

When in Doubt or Feel Lost….Click the Search Tab

Client Entry

- Search for Client, if not found, Add new Client
- Complete Intake Page, Save

  <u>Adding Family Members</u>
- Back to Search
- Repeat 1-2 for each additional member.
- Click on **Search**, Find <u>HOH</u> on right side of page and **click on name. Is HOH Name Displayed across the top of the Page?**
- Click on Household Members **Manage** **(Orange Button)** on right side of screen

  If HOH is Not on The Right,
  Click on the Search tab (Top Right) Search for HOH and click on Edit. Ensure HOH Name is displayed at Top of Page and then click on Manage Right side of screen

- Next to each person you want to add to the family, click the button **Add**
- Complete relationship status with Date client joined the household. ***** <u>Notice it states who HOH is here</u>**
  - **<u>Anytime there is a STAR next to a name on the right side panel, it is saying this is your assigned HOH</u>**

Enrolling in Program

- Click on **Program Tab**
- Choose Program and click the **Drop Down Arrow**
- **Do you wish to add all Family Members into this Program? If so, check the box next to each Name**
- Click **Enroll**
- After **completing Enrollment Form for HOH**, you will be automatically prompted to complete all enrollment forms for House Hold Members.

Recording Program Services

- Click on **History**
- Under Program History, under the Program you wish to add the service to, click **Edit**
- Click on the **Provide Services Tab**.
- You will find a complete list of Funder required services offered for this program. Select the **Down Arrow** on the service you are seeking
- Complete all Info required. *****Note Some Services are able to be assigned to all Family members with the **"Include Family Members"** option.
- After you are finished, click **Submit**

*****Re-occurring Services-- When you click on a service to enter for a new date, the last date it was entered is automatically in the date field. Enter the correct data and save. A new service will be entered.**

Exiting a Client

- Begin on the History Tab
- **Edit Active** Program
- Click on the last Tab on the right labelled **End and complete the page.**
- **Save and Close.**